



Borel Private Bank & Trust Company[®]

Job Description

Borel Private Bank & Trust Company, headquartered in San Mateo, California, is a wealth management firm offering private banking, investment management, and financial planning services to our clients.

Not only is Borel Private Bank & Trust Company the best place to bank, it is also the best place to work, having been voted one of the Best Places to Work in the Bay Area 2004 - 2010 by the Business Times and Business Journal! An attractive work environment, combined with excellent salary and benefits, makes Borel Private Bank & Trust Company an ideal choice for your banking career. Borel Private Bank & Trust offers a competitive salary, bonus program, 401(k) and excellent career growth opportunities.

Position: Assistant Vice President – Executive Assistant, Commercial Loans

PURPOSE OF THE JOB: Assist the Commercial Loan Group Leader by providing clerical and administrative support, customer assistance, and other tasks as necessary to provide superior client service.

MAJOR AREAS OF RESPONSIBILITY:

Loan Assistant Duties

- Maintain an overall knowledge of Borel Private Bank loan products.
- Provide word processing, spreadsheet and/or other project support, and all secretarial functions including mail, phones, files, copying and appointment scheduling. Type credit applications (L-2s) as needed and distribute materials for Loan Committee meetings.
- Interact with clients and other business contacts via telephone and in person to research and resolve loan and deposit inquiries, follow-up and respond.
- Initiate loan advances and paydowns; monitor and assist Lending Officers with collection of delinquent payments. Notify clients of impending loan maturities.
- Possess knowledge of loan documentation. Ensure accurate file set-up and maintenance of credit files.
- Assist with business development reporting and tracking activities.
- Pull credit reports or other independent information as requested by officer. Order title, flood, and appraisal reports.

Assisting the Commercial Loan Group Leader

- Review calendar and set appointments
- Greet and assist appointments and drop-in guests
- Handles phone calls and inquiries
- Assist with meetings scheduled by the Commercial Loan Group Leader
- Prepare correspondence

Qualifications and Education Requirements

- Must be a California state licensed Notary Public. Maintain notary commission to assist with documentation signing and other notarization consistent with Bank policy.
- Must have extensive knowledge of the Commercial Lending process
- Minimum five years of Loan Assistant experience
- Must have extensive knowledge of MS Suite, especially Excel

Preferred Skills

- Demonstrate excellent organizational skills and possess a personable, polite and patient demeanor. Ability and willingness to work as a team member. Reliable with attention to detail.
- Ability to operate office equipment, including copiers, printers, fax machines and scanners
- Excellent verbal and written communication skills
- Strong organizational skills
- Capability to handle multiple projects with competing priorities and ability to meet deadlines while anticipating quickly changing needs
- Attention to detail and accuracy; high degree of tact, discretion and excellent judgment

For this position, submit your résumé via e-mail ONLY to Humanresources@borel.com. No telephone calls please. For more information about Borel Private Bank, please visit our website at www.borel.com. Borel Private Bank & Trust Company is an Equal Opportunity Employer.