



# Borel Private Bank & Trust Company<sup>®</sup>

## *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: Note Department Representative (24 hrs/week)**

### **MAJOR AREAS OF RESPONSIBILITY:**

**Input new and renewed loans to Loan Accounting/Mortgage Loan system within 2 days of receipt of approved loan package.**

- Approved loan package along with file will be received by the individual inputting the data to the loan accounting system
- File reviewed prior to input to ensure appropriate approval/s in place.
- Documents reviewed prior to input.
- Loan input to system
- File placed in designated area for callback

**Callback loans booked to Loan Accounting/Mortgage Loan system to ensure data has been input accurately**

- Utilizing the file and loan documents verify the information that has been input to the system to ensure the information was captured accurately.

**Act as backup for the preparation of the monthly Missing Title Report**

- Work from the latest Query report (customized report) to identify those loans coded as having outstanding title reports.
- Review Credit File if any discrepancies

**Act as backup for the preparation of the monthly Missing Deed of Trust Report**

- Work from the latest Query report (customized report) to identify those loans coded as having outstanding title reports.
- Review Credit File if any discrepancies

**Assist with the mailing of loan billings/statements**

- Obtain the box/s of envelopes that correspond to the size of the billings/statements and place the billing/statements in the envelopes with a return envelope enclosed.

**Assist with scanning loan documentation and credit files**

- Each morning the bucket containing loan documentation ready to be scanned is to be removed from the vault and brought to where the scanner is located.
- Files that are ready for scanning should also be brought to the same area, as needed.
- Documentation should be prepared for scanning by inserting colored paper to divided the documents according to the sections/tabs established



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All of the above duties, at one time or another, requires bending, stretching, reaching, lifting files or boxes, pushing a cart containing files, or climbing a stepladder.

## **Qualifications and Education Requirements**

- One to five years previous Note Department experience.
- Experience with a loan accounting system.
- Excellent communication skills, verbal and written.
- Ability to multi-task and work in a fast-paced environment.
- Ability to prioritize and meet deadlines.
- Attention to detail, accuracy and confidentiality
- High School Diploma

## **Preferred Skills**

- Proficient in Excel
- General knowledge of LaserPro

## **Other**

- Capable of climbing a 3 ½ to 4 ft. stepladder and reaching to access files.
- Capable of lifting boxes or files with a maximum weight of 10-12 pounds.

For this position, submit your résumé via e-mail ONLY to [Humanresources@borel.com](mailto:Humanresources@borel.com). No telephone calls please.

For more information about Borel Private Bank, please visit our website at [www.borel.com](http://www.borel.com). Borel Private Bank & Trust Company is an Equal Opportunity Employer.