



## **Loan Officer Assistant/Customer Service Representative JACKSON, GA**

### **Job Summary:**

Responsible for offering customer centered financial products and services to consumers and businesses. Delivers industry leading Signature Service while providing loan processing services and administrative support for Lenders.

### **General Description/Duties:**

- Compiles, prepares, and processes loan file documentation (appraisal orders, credit reports, title work, etc.) necessary for loan approval
- Serves as liaison between the loan department, officer and/or customer to coordinate and ensure successful loan closing
- Prepares loan tickets and disbursement of loan proceeds
- Assists officer in clearing loan collateral or financial documentation exceptions
- Ensures compliance with and keeps abreast of internal controls, operational procedures and related documentation
- Complies with all Federal and State banking laws and related regulations, to include but not limited to the Bank Secrecy Act
- Builds and maintains productive relationships with co-workers and partners throughout the organization
- Actively engages in the job function of Customer Service Representative
  - Uses a consultative approach to understand customers' financial needs and educates them on how to get the greatest value from our products and services
  - Provides tailored solutions (establishes and expands relationships) by opening and maintaining a variety of deposit accounts and financial services
  - Resolves product or service problems by clarifying and determining the cause of the problem, selecting and expediting the best solution, and following up to ensure resolution
  - Recognizes and refers cross-sell opportunities
  - Captures and tracks key customer interactions for delivering effective sales and service

### **Requirements:**

- High School Diploma or equivalent work experience
- Minimum of 1 year prior banking experience required; loan product related experience preferred
- Previous Loan Officer Assistant and/or Customer Service Representative experience strongly preferred
- Excellent interpersonal communication and presentation skills (verbal and written)
- Strong analytical and problem solving skills
- Ability to multitask and derive innovative solutions
- Accurate and detailed in work product
- Proficient computer skills and active engagement in new technology

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