

## Job Description – Lending Assistant

Position title: Loan Assistant  
Exempt Status: Non-Exempt (hourly), full-time position  
Reports to: Commercial Loan Manager

---

**Position Summary** The Loan Assistant shall act primarily to support the River City Loan officers. They will also perform various support duties pertinent to meeting the needs of our customers and development of new business for the bank.

### **Key Duties and Responsibilities**

- Assist the loan officer in the collection of and preparation of all necessary loan documents as required by the loan officer and bank policy (as required by the loan documentation checklist)
  - Examples:
    - a. assist as needed in coordinating loan closings including Lender, customer, attorneys and doc prep
    - b. notarize loan documents
    - c. aid in obtaining required financial information
    - d. Verifying collateral insurance requirements with agents
    - e. Track receipt of appraisals
- Order all appraisals and perform the compliance/regulatory review of the consumer appraisals.
- Review files for completeness prior to submitting the loan to the Loan Doc Prep Department.
- Assist the officers in working and clearing outstanding loan exceptions
- Aid in managing the maturing loan list
- At the direction of the loan officers, meet with customers to facilitate renewal of some loans
- Cover telephone calls and handle customer inquiries as necessary and keeping loan officer informed of actions taken or needed
- Set appointments for loan officers as needed
- Build and maintain positive relations with all customers, potential customers and co-workers.
- Comply with all department and company policies, procedures and regulations
- Complete other duties as assigned

### **Knowledge, Skills, & Abilities**

- Excellent customer service skills
- Detail oriented with high degree of accuracy
- Strong communication & organizational skills
- Familiar with banking terms, particularly as it relates to loans and collateral
- The requirements listed above are representative of the knowledge, skill, and/or abilities required.

### **Education & Experience**

High school diploma or GED equivalent required.  
Previous loan experience preferred.