

JOB DESCRIPTION

JOB TITLE: Sales Assistant II
DEPARTMENT: Various
REPORTS TO: Region President or Sr. Banker
FSLA Status: Non-Exempt

POSITION SUMMARY: Responsible for assisting the Region in management of client relationships and maintaining files/relationships in conformity with bank policy and regulatory requirements.

PRIMARY ACCOUNTABILITIES AND RESPONSIBILITIES: (95%)

- (40%) 1. Assists lead officers with request for yearly financials from borrowers, completes all financial input prep assigned by banker. Takes active role in full Credit Approval Process including gathering, compiling, and submitting all documentation required by Credit Analyst Department to process initial loan application/spread financial information. Possesses working knowledge of both Web Equity Manager and Moody's Programs in order to navigate, locate and print reports and financial analysis. Possesses a full understanding of loan packet preparation to include completing Credit Presentation Checklist, Loan Officer Comments, and compiling full loan packet. Work closely with title companies and appraisers in obtaining necessary supporting information. Completes Laser Pro Loan Input Form, print and review of final loan documents. Handles loan closings for officers when needed (Final review will always remain the responsibility of the Banker).
- (35%) 2. Builds a thorough knowledge of client files and accounts in order to provide effective customer service with the lead banker. Assists in strengthening, maintaining and expanding client relationships through professional support for Region President and Commercial Bankers.
- (15%) 3. Takes an active role in the sales and business development efforts as directed by the Region President. Calls on existing and prospective clients as part of on-going business development. Conducts collateral inspection on selected clients under direction and supervision of lead banker. Assists the Region President with administrative/clerical functions.
- (5%) 4. Provides support and assistance to the lead banker on smaller ag/commercial requests i.e. updated financial information, analysis, approval, and loan closings within the established lending objectives, policies, and procedures.

SECONDARY DUTIES AND RESPONSIBILITIES: (5%)

1. Maintains knowledge of business retail products. Example: Remote Capture; E-Corp; business bill-pay.
2. Remains knowledgeable and abreast of guaranteed government loan programs and other conventional financing mechanisms as a vehicle for customer financing needs.
3. Maintains compliance with bank policies and procedures and federal and state laws/regulations.
4. Other duties may be assigned.

The statements contained in this job description describe the general nature and level of work being performed by the person accepting this role. "Secondary Duties and Responsibilities" are considered incidental or secondary to the overall purpose of the job. This job description does not state or imply the only duties and responsibilities assigned to this job. Employees holding this job will be required to perform any other job-related duties requested by management. All job requirements are subject to possible modification to reasonably accommodate individuals with a disability.

ROLE QUALIFICATIONS:

Education

- Two (2) year Associate degree with clerical/administrative training and/or related training experience.

Experience

- 3-5 years related banking/analysis experience and/or training
- Or equivalent combination of education and experience

Other Skills/Characteristics

- High level of organizational skills
- Confidentiality
- Professionalism
- Ability to effectively communicate and provide customer service to internal and external clients
- Attention to detail and ability to multi task
- Excellent communication skills, both verbal/written

Performance Measures

- Upon receiving “complete information” from the loan officer, week to two week turnaround time on loan closings.
- Provide excellent internal and external customer service.
- Accuracy on all written and verbal communications

By signing below, I acknowledge I have read and understand the Job Description above.

Employee Signature _____ Date _____