



Post Date 4/11/2019

Title Full-Time Loan Assistant/Portfolio Manager

General Summary

The Portfolio Manager is a resource within the lending area to support the efforts of the Senior Loan Officer, Commercial Loan Officer and Regional Loan officers to effectively and efficiently manage the loan portfolios and loans under consideration. The Portfolio Manager is responsible for supporting the lending function to manage and update information related to new loan applications and loans in the portfolio. The incumbent will interface with Credit Administration, Loan Administration and customers directly in managing relationships. Assist in preparation of loan requests, loan approval packages, portfolio documentation requests, ordering appraisals and other due diligence, funding requests and collection of required financial reporting documentation.

Essential Functions

- Assist in preparation of loan requests and loan approval packages– new, renewals, extensions and other changes.
- Work with Loan Officers in processing new loan applications. Meet with applicants, as necessary, to obtain information for loan applications and to answer questions about the process.
- Work with loan officers to help to efficiently and effectively manage existing loan portfolios.
- Perform specific tasks assigned by Loan Administration Manager.
- Interface with Credit Administration and Loan Administration/Servicing in managing loan relationships.
- Assist in collecting due diligence for loan requests including post-closing.
- Follow up with Customers, Loan Officers and Loan Administration at all times, keeping them informed of the loan process, including answering questions and concerns.
- Maintain records, files and other documentation according to procedure.
- Assist loan officers in completing routine reporting.
- Meet with customers as required to obtain necessary information or to complete documents. Ordering appraisals, flood certifications, collateral searches and other pre-closing items.
- Review and update credit and loan files.
 - Make copies of important documents and ensure copies of documents are maintained.
- Prepare notices, letters and other correspondences.
- Maintain a positive and productive working relationship with Management, loan officers and loan administration/servicing staff.
- Perform any and all other duties as assigned by management.
- Adhere to Bank policies and procedures required by federal and state statutes, laws and regulatory rules.

Knowledge, Skills and Abilities

- Effective employer/employee relations.
- Three years of banking experience with a track record of increasing responsibility – some course work in business, finance, or accounting preferred.

- Comprehensive knowledge of bank operating systems and lending operations functions.
- Superior customer service skills.
- Extensive knowledge of policies, procedures, regulations and compliance requirements governing loan accounts and services.
- Sound judgment with outstanding analytical skills
- Ability to multi-task and strong attention to detail.
- Excellent written and oral communication skills.
- Understanding of loan administration.
- Able to deal tactfully and efficiently with customers and loan officers.
- Organized; attention to detail and accuracy.
- Commitment to the Queenstown Bank's Code of Ethics.

Performance Measurements

- Performance measured by his/her ability to establish and maintain the appropriate working relationship with the Loan Officers to support the lending efforts of the Bank.
- Accuracy and thoroughness will be monitored.
- Incumbent will be measured on his/her ability to work with colleagues to further the efforts of the Bank in the community.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

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