

Job Title: Receptionist/Loan Assistant	FLSA Status: Non Exempt
Reports To: Lender	Revised Date: 8/11/2021

Position Purpose:

Meet, greet, and assist customers as they enter the lobby of the bank, while also providing assistance to the Lending staff.

Job Duties and Responsibilities:

- Greet every person who enters the lobby of the bank in a personal and professional manner.
- Provide assistance to Lending staff including updating loan data for entry into electronic files and assembling documentation for loans.
- Order credit reports, appraisals and floods; initiate title work and conduct UCC searches.
- Ensure loan files contain accurate documents with proper signatures, dates, correct legal descriptions and other data.
- Review loan exceptions with officers.
- Assist and refer potential customers to the appropriate areas of the bank.
- Provide assistance and entry into the customer(s) safe deposit boxes as needed.
- Answer incoming phone calls quickly and efficiently and determine the caller needs.
- Perform clerical duties (copy, scanning, fax, and indexing) as needed.
- Control opening and closing hours of the bank as it relates to the front entrance doors.
- Prepare requisitions for approval and payment submission.
- Maintain knowledge of and ensure compliance with the Bank Secrecy Act.
- Participate in bank/community activities.
- Complete annual training as required.
- Other duties as assigned.

Skills and Abilities Required:

- Responsiveness in a fast paced, fluid environment and be held to minimum production standards while maintaining excellent organizational skills.
- The ability to build relationships in a team-oriented environment.
- Ability to maintain confidentiality.
- Strong attention to detail; accuracy with numbers, consistency and completeness are critical.
- Proactive; desire to identify opportunities rather than react to problems.
- Basic knowledge of Microsoft Office Suite.
- Working knowledge of office machines, i.e. copier, fax, scanner.

Experience and Education Requirements:

- High School diploma, or equivalent.
- Minimum one (1) year experience working in an office and/or customer service environment.

Physical Requirements:

- Typically requires sitting for long periods of time with frequent keyboard/mouse usage and intermittent stooping, bending and walking.
- May occasionally lift up to 25 pounds which may include the need for independent mobility: bend, reach, or kneel.
- Visual and auditory skills are required.

Performance Standards:

- Accuracy: Completeness of documents prepared.
- Responsiveness: Timeliness of completion of documents and responding to requests for information.
- Relationships: Ability to work well with others.
- Guidance: Ability to provide guidance by answering questions and training others.

Firststar Bank is proud to be an Equal Opportunity Employer: EEO/M/F/Disabled/Vets

Acknowledgement:

I have read this job description and fully understand the requirements set forth. I understand that this is to be used as a guide and that I will be responsible for performing other duties as assigned. I further understand that this job description does not constitute an employment contract with Firststar Bank.

Employee Name: _____

Signature: _____

Date: _____