



Position: Processing Assistant
Reports to: Loan Processing Supervisor
FLSA Status: Non-Exempt
Location: 233 E Idaho Street, Kalispell, MT 59901

Position Summary

The position of Processing Assistant will provide support to the activities of the Loan Processors, Loan Processing Supervisor, and Loan Operations Officer within the Office in accordance with the organization's Mission Statement and Core Values. The position will work with internal team members, customers, and vendors, such as title companies, and insurance companies. The position reports to the Loan Processing Supervisor.

Essential Functions

- Pre-scan all loan files prior to processor building loans
- Scan completed loan files
- Documentation tracking of completed loan files
- Build loans on Suntell Document Imaging System
- Perfect collateral liens
- Process payments and advance requests
- Provide payoffs
- Follow up on documentation pending items (recorded deeds, UCC's, etc.) and insurance logs which includes completing the tracking form
- Assist with filing and organization of Promissory Notes
- Cross train and support other positions in the department; Loan Processors and Loan Clerks as time allows
- Maintain knowledge of banking products and services to cross sell customers
- Provide exceptional customer service while maintaining knowledge of Bank policies and procedures, applicable laws and regulations/compliance requirements including but not limited to the Bank Secrecy Act, the Patriot Act and the Office of Foreign Assets Control

Additional Responsibilities

- Complete required compliance training annually
- Work any exceptions related to compliance or missing documentation
- Provide back up and assistance to Loan Clerk job responsibilities
- Assist with phone or lobby coverage as requested
- Must be willing to complete other duties as assigned
- Participate in a minimum of two Heritage Club events annually
- Participate in two Highlander Track events annually
- Participate in two community events representing TRB (approved by manager)

Skills and Competencies

- Prior banking experience is helpful
- Minimum of one-year clerical/administrative experience preferred
- Must be bondable
- Computer proficiency required – ability to use Internet, Outlook, and Microsoft Office Word and Excel
- Must be able to conduct oneself in a manner that promotes trust in the individual and our organization
- Must maintain confidentiality at all times due to the nature of information about customers and transactions
- Must be able to communicate verbally and in writing across all facets of Bank
- Work cooperatively and respectfully with all Bank Team Members
- Self-directed – must be able to fulfill the responsibilities of the position with minimal supervision
- Must be able to prioritize and organize responsibilities to maximize productive results

Physical Demands

- Normal office environment
- Extended PC viewing, keyboarding with periods of sedentary work
- May be required to stoop, kneel, stand, walk, talk, hear, reach within hands and arms
- May be required to occasionally lift/move up to 30 pounds

The physical demands noted above are representative of those that must be met by an employee to successfully perform the essential functions of the position. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Employee Signature

Date

Printed Name