

JOB DESCRIPTION

Position: Operations Service Representative, Renewal Clerk
Reports to: Assistant Manager

Group: 1

Primary Responsibility/Basic Purpose:

Under general supervision, the Operations Service Representative, Renewal Clerk is responsible for the centralized processing of mortgage and student loan renewals. Coastal Community strives "to be the leaders in building relationships that improve financial health, enrich people's lives and build healthier communities." It is the responsibility of the Operations Service Representative to carry the vision statement forward in order to build, maintain, attract and expand the member's relationship with Coastal Community. The Operations Service Representative provides friendly, professional service in an efficient and financially responsible manner.

Representative Duties:

1. Produce mortgage and loan renewal notifications and process related documentation.
2. Process discharges.
3. Compiles lending data and produces various reports.
4. Prepare student loan renewal reports for branches.
5. Answers and responds to telephone inquiries as required.
6. Performs other related duties and back-up service as required.
7. Audits online banking loan and mortgage transactions.
8. Administers insurance information on mortgaged properties.

Required Qualifications:

- Minimum of one year financial service experience or an equivalent combination of education and experience.
- Successful completion of CUIC 185 and/or CUIC 200.
- Successful completion of the MSR II course and exam.
- Solid working knowledge of all Coastal Community products and services.
- Familiarity with lending documents and procedures.
- Solid working knowledge of the banking system.
- Solid working knowledge of administrative procedures relating to the processing of mortgage documentation.
- Excellent written and verbal communication skills.
- Above average MSR/OSR skills.
- Demonstrated leadership skills.
- Actively pursuing the CUIC Fellowship Designation and/or other related education.

Required Abilities:

- Proficient with the Windows suite of programs.
- Ability to utilize sound judgement in developing recommendations.
- Ability to multitask while providing quality service.
- Ability to complete projects and work within time constraints in a high paced environment.

Skills to Benefit this Position Include:

- Customer Service Skills
- Time Management Skills
- Interpersonal Skills
- Problem Solving Skills

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