



## Residential Mortgage Delivery / Loan Boarding

### Identifying Information:

- Department: Loan Operations
- Reports To: Kimberly Isaacs
- Location: Operations Center, 105 N Broadway, Lebanon, Ohio 45036
- Hours: M – Th 8:15 to 5:00, Friday 8:00 to 6:00

### Summary:

- Primary responsibility is to deliver Secondary Market Real Estate loans to Freddie Mac, Fannie Mae, and other Secondary Markets within required time frames. Including but not limited to both servicing retained and servicing released.
- Responsible for the timely and accurate boarding of loans to the core system. This includes both consumer and commercial loans.

### Essential Duties and Responsibilities:

- Delivery of Secondary Market loans to various investors by their individual delivery guidelines and requirements within the investor lock expiration. (50%)
- Preparation of all credit and closing document file bundles for investor delivery (15%)
- Ensure all files have the proper documentation prior to boarding to the core. (10%)
- Boarding of loans to the Core system. (15%)
- Scan closing documentation to the image system. (10%)

### Required Traits/Behavioral Competencies:

- Must have knowledge and be skilled in various investor delivery requirements/rules/guidelines/procedures.
- Ability to work independently, prioritize tasks, and meet required deadlines.
- Attention to detail and exceptional product quality.
- Must be able to communicate and interact with all levels of bank personnel as well as outside title agencies.
- Dependable, organized, and of great integrity.

### Qualifications/Education/Experience:

- High School diploma or equivalent.
- 2 or more years' experience in loan delivery required.
- Knowledge of Freddie Mac and other investor delivery required.

### Job Competencies/Skills:

- Decision making, productivity.
- Working knowledge of Excel, Outlook, and Word.
- Strong verbal and written communication skills.

### Physical Requirements:

- Must be able to remain in a stationary position up to 75% of time.  
Must be able to lift up to 10 lbs.

### Work Environment:

- Office setting, cubical, & desk.