



Position Description

Documentation Preparation Specialist

Identifying Information:

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

Summary:

- Responsible for the preparation of closing documentation for conventional and other private investor loans. Additionally, reviews completed closing packages to ensure they have been properly executed and are complete.

Essential Duties and Responsibilities:

- Read and interpret credit approval conditions. (10%)
- Prepare commitment, notes, lien instruments, and other general loan documents outlined in the credit approval conditions. (30%)
- Ensure all documents are consistent and comply with federal and state guidelines as well as FHLMC, FHA, RD (USDA), VA and/or conventional guidelines. (10%)
- Monitor compliance changes that impact consumer and residential loans to ensure documentation procedures are in compliance. (10%)
- Prepare funding instruments to close loan transactions. (20%)
- Review executed documents to ensure all documentation is received. (20%)

Required Traits/Behavioral Competencies:

- Must understand RESPA, TRID and all laws related to real estate lending - including timelines.
- Understand federal regulations with regard to Private Mortgage Insurance and Flood Disaster Protection Act.
- Ability to work independently and prioritize tasks.
- Work effectively 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 Document Preparation preferred.
- Experience with LaserPro or Doc Magic preferred.

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 stationary position up to 75% of time.
Must be able to lift up to 10 lbs.

Work Environment:

- Office setting, cubical, & desk.