



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

**Work Environment:**

- Office setting, cubical, & desk.