



## **Position Description**

### **Commercial Documentation Preparation Specialist**

#### **Identifying Information:**

- Department: Loan Operations
- Reports To: Kim McDonald
- Location: Operations Center, Lebanon OH or various Branch locations
- Hours: M – Th 8:15 to 5:00, Friday 8:00 to 6:00

#### **Summary:**

- Responsible for maintaining a solid foundation in all areas of commercial loan documentation, keeping updated on changing legal situations, industry trends and product specific issues. Demonstrate and apply knowledge of diverse commercial loan documentation, legal requirements, Bank policies, state and federal laws and regulations and apply such knowledge.

#### **Essential Duties and Responsibilities:**

- Read and interpret credit approval conditions. (10%)
- Prepare loan documents for both new and renewed commercial loans, including third party document coordination, completion and review, ensuring that all prepared loan documents comply with the loan approval terms. (70%)
- Monitor compliance changes that impact commercial loans to ensure documentation procedures are in compliance. (10%)
- Review executed documents to ensure all documentation is received. (10%)

#### **Required Traits/Behavioral Competencies:**

- 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 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.
- Work from home – post training