**ALL BANKS**

# Job Description

**TITLE:** Relationship Banking Associate I **REPORTS TO**: AVP, Credit Administration

**DEPARTMENT:** Credit Administration **LOCATION:** CRBT **-** 1st Avenue

**JOB SUMMARY:**

Under minimal supervision, but in line with established policies and procedures, is responsible for preparing commercial loan documents, maintaining loan files, and providing customers with information about the Bank’s products and services, and processing transactions as it relates to those accounts. Contributes to client relationships by providing consistent quality level of service.

**ESSENTIAL FUNCTIONS:**

1. Assists officers to apply due diligence in compliance with loan policy and approved structure for each credit in regards to the preparation of commercial loan documentation and make necessary disbursements.
2. Records and releases all types of collateral documents.
3. Assists officer with clearing loan exceptions/ticklers.
4. Organizes and maintains all documents within an imaging system and within the loan file.
5. Obtain and maintains a thorough knowledge of internal procedures, various systems and/or web based applications used but not limited to Signature, Laser Pro, Nautilus.
6. Effectively communicate with and assist officers, employees, customers and local professionals with any questions or research they may request to satisfy their customers’ needs.
7. Assist officers with a wide range of servicing duties related to loan and depository relationships.

**ADDITIONAL RESPONSIBILITIES**:

1. Attend training sessions, webinars or seminars to enhance knowledge of job requirements.
2. Participates in quarterly all staff meetings and departmental meetings.
3. Performs various other duties as required or assigned.

**QUALIFICATIONS:**

1. Previous loan experience preferred.
2. Ability to perform multiple tasks in a fast paced environment while paying attention to detail.
3. The interpersonal skills to communicate effectively with customers and employees.
4. Strong PC skills including Microsoft Office Suite.
5. Perform assigned responsibilities with minimal supervision.
6. A high school diploma or equivalent.