



## **Loan Administration Associate**

**Job Classification:** Full-Time, Non-Exempt

**Reports to:** Loan Administration Officer

---

---

### **Position Summary**

The Loan Administration Associate will be required to provide day-to-day administrative and functional support to our Loan Administration team. This position involves performing various tasks related to loan servicing, collateral and escrow support, loan maintenance, and handling loan correspondence that requires action. The insight gained in this position offers a unique opportunity to gain hands-on experience in the loan administration field and serves as a steppingstone to more specialized roles within the department. The ideal candidate should be highly organized, detail-oriented, and capable of efficiently managing routine administrative duties in a fast-paced environment.

### **Principal Duties and Responsibilities**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills and/or abilities required. The duties listed below may not include all responsibilities that the person in this role may be asked to perform. May be required to perform other related duties, as assigned, including cross training across other departments, as necessary. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

- **Loan Administration Support:**
  - Assist with the preparation and organization of loan documentation, ensuring accurate and up-to-date records.
  - Perform data entry into loan systems, ensuring proper updates to loan accounts and documentation.
  - Verify and review loan documents for completeness and compliance.
  - Provide clerical support to the loan administration team, including organizing files and preparing reports.
- **Collateral and Escrow Support:**
  - Assist with tracking and maintaining collateral files to ensure proper documentation and compliance.
  - Help manage escrow accounts, including monitoring balances and preparing necessary reports.

- Support the processing of collateral releases and provide requested documentation for escrow-related inquiries.
- **Loan Servicing and Maintenance Support:**
  - Assist in loan servicing tasks, including tracking payments, loan balances, and loan status.
  - Help generate and send loan statements to borrowers, ensuring accuracy.
  - Provide maintenance support for loan accounts by processing routine changes, updates, and requests.
  - Respond to general inquiries regarding loan servicing and maintenance.
- **Correspondence Disposition:**
  - Handle all incoming correspondence and documentation related to loan accounts, ensuring it is sorted, reviewed, and routed to the appropriate departments for proper resolution.
  - Process and manage return mail, ensuring any returned documents or undelivered mail are properly addressed and redistributed.
  - Ensure timely distribution of important documents and notices to the relevant team members.

### **General Administrative Duties:**

- Perform general clerical tasks such as scanning, copying, and filing documents.
- Provide support with answering phones, taking messages, and assisting with customer inquiries.
- Participate in departmental meetings and training sessions to enhance knowledge and skills in loan administration.
- Assist with organizing meetings, preparing reports, and supporting special projects as directed by management.
- Perform other duties as assigned by bank management.
- Complies with federal and state regulations and all established bank policies and procedures.

### **Education and Experience Requirements**

- High school diploma or equivalent, or bachelor's degree in finance business, or a related field preferred.
- Prior experience in banking or finance services is preferred.
- Strong attention to detail with an emphasis on accuracy in data entry and document handling.
- Ability to manage sensitive information confidentially and professionally. Proficiency with Microsoft Office Suite (Word, Excel, Outlook).
- Strong organizational, communication, and time-management skills.
- Ability to work effectively in a team environment and take initiative in daily tasks.
- Previous clerical or administrative experience is a plus but not required.

### **Work Environment:**

- This is a full-time, entry-level position in a professional office setting.

- Training on loan administration processes, collateral management, and mail handling will be provided.
- Opportunities for professional development and advancement within the bank.
- A supportive and collaborative work environment focused on community banking and customer service.

### **Training Requirements**

All employees are required to attend scheduled mandatory trainings and complete online regulatory compliance training courses applicable to their specific job function. In all situations, employees must ensure that their actions fully comply with all federal banking laws and regulations, including internal bank policies and procedures. Failure to adhere to these requirements will be grounds for disciplinary action, including probation and possible termination.

### **Attendance**

Punctuality and regular attendance should be regarded as essential functions of any position at Texas National Bank.

### **Community Involvement**

Texas National Bank's Mission Statement includes a commitment to helping our communities grow by serving them with pride and integrity. All employees are encouraged to volunteer for bank sponsored activities, civic, charitable and community events and to be active in the communities we serve.

***Management reserves the right to change this position description at any time according to business needs.***

### **Our Hiring Philosophy**

Texas National Bank recognizes that the quality of our people is the foundation for our success. Attracting individuals who value a challenging work environment that rewards the contributions of its people is the cornerstone of our hiring philosophy. It is the policy of Texas National Bank to provide equal employment opportunities (EEO) to all persons regardless of age, race, sex, religion, national origin, handicap, marital status, or other attributes not pertinent to the job requirements. This policy reflects our practice of making all employment decisions, from recruitment to promotions, based on an individual's qualifications without discrimination on any basis.