



Position: Loan Administrator
Reports to: Executive Director
Salary: Commensurate with experience
Status: Part-time; 24-32 hours per week
Location: Keshena, WI – hybrid

Description:

The Loan Administrator is responsible for keeping the day-to-day operations that involve loan making a smooth process. From the initial intake to loan follow-up, the Loan Administrator will assist with the process to ensure completion and accuracy. The ideal candidate will have exceptional organizational skills, great communication skills, and the ability to pay attention to detail. The Loan Administrator is often the first point of contact for clients; this person must also have great customer service skills.

Essential Duties:

- Provide information and answer questions to potential borrowers and current clients in an efficient and effective manner.
- Ensures completion and compliance with programs. This includes collecting necessary information, all signature, and initial fields are complete, all data is entered, follow up as necessary, etc.
- Pull reports, file UCCs/EFs, update the Loan Pipeline, enter clients into the system.
- Back-office support work that assists the Loan Officers and Executive Director in underwriting and technical assistance.
- Maintain the physical and digital loan files. This includes organizing, filing, ensuring completion and compliance, reviews, track progress, disbursing funds, etc.
- Prepares client mailings/emails such as general correspondence, pre/post close follow-up, and other duties as assigned.
- Monitors the portfolio and notifies the Loan Officers/Executive Director of any changes.
- Assists Loan Officers and Executive Directors regarding loan files.
- Follow confidentiality agreements and maintain a professional attitude in all work-related situations, including sensitive situations.

Minimum Qualifications:

- Associate degree in business, finance, accounting or closely related field.
- A valid driver's license, with reliable transportation and automobile insurance.
- Experience with Microsoft Office to include Word, Excel, Outlook, and PowerPoint, and loan portfolio software.
- Experience working with Native Communities and Tribal Members



Other Skills, Knowledge and Abilities:

- Strong written and verbal communication skills
- High ethical and professional standards
- Strong sense of confidentiality
- Attention to detail
- Strong problem-solving skills/critical thinking skills
- Abilities to efficiently manage multiple projects with accuracy
- Self-motivated with the ability to work independently

* Native American preference in hiring.

Woodland Financial Partners, Inc. is a non-profit 501(c)(3) Native Community Development Financial Institution revolving loan fund. Woodland Financial Partners Inc. provides affordable loans and financial education to Native communities located in the state of Wisconsin

Woodland Financial Partners, Inc., is an equal opportunity employer and abides by all state and federal laws.

Interested? Please submit Resume, Cover Letter, and any other relevant information/documentation to averstoppen@woodlandfinancial.org