

**Lane Council of Governments  
Job Classification**

<b>Job Title:</b>	<b>Assistant Loan Officer</b>	<b>FLSA Status:</b>	<b>Exempt</b>
<b>Division:</b>	<b>Administration</b>	<b>Range:</b>	<b>17</b>
<b>Reports to:</b>	<b>Loan Program Manager</b>	<b>Last Revised:</b>	<b>July 2004</b>

**General Statement of Duties**

Assists with tasks involved in making and servicing loans in the business lending program.

**Supervision Received**

Reports to a Loan Manager, who assigns and reviews work. Work is performed under applicable policies, guidelines and appropriate technical and professional standards. Work performance is evaluated through periodic conferences and reports and through the adequacy and timeliness of records, reports and services provided.

**Supervision Exercised**

None.

**Resource Responsibility**

Limited responsibility for financial or human resources. Work is part of a larger task where many checks exist for errors.

**Essential Job Functions**

Assists Loan Manager in closing business loans and servicing existing accounts.

Responsible for closing loans under the business lending program which includes: independently preparing loan application and closing documents, reviewing application packets for completeness, typing and recording documents, perfecting lien positions, and analyzing financial statements of applicants for credit worthiness.

Services loan portfolios, which includes: site visits, updating and reviewing financial statements, and responding to servicing requests.

Assists with servicing tasks, including prepayments and subordinations.

Maintains loan program database, reporting, and filing systems.

Produces portfolio reports, as needed.

### **Other Job Functions**

Plans and conducts special assignments as directed by the supervisor.

Performs other related duties as assigned.

### **Working Conditions**

Duties are primarily performed in an office environment while sitting at a desk or computer terminal., or standing at a counter.

### **Knowledge, Skills, and Abilities**

Knowledge of business finance and credit analysis.

Ability to read and interpret business plans and related financial documents.

Excellent accuracy and attention to detail.

Ability to enter data onto computer and develop and maintain spreadsheets and automated reports.

Ability to communicate clearly and effectively in writing and orally.

Ability to work independently and handle multiple projects and a high volume of work.

### **Education and Experience**

Bachelor's degree in accounting, finance, or business, and one year's experience in commercial credit analysis or commercial loan closing and servicing; or equivalent combination of education and experience which provides the candidate with the required knowledge and ability to perform the job.

### **Licenses, Certificates & Other Requirements**

Oregon Driver's License or the ability to obtain reliable transportation to visit project sites throughout Lane County.