

Intake Specialist Team Position Description

Organization Mission: Our Mission is to deliver exemplary services by providing financial education, training, and access to capital to support sustainable business and community development while improving the quality of life within our communities.

Position Title: Intake Specialist
Location: Black River Falls
Hourly Pay: \$18-\$25
Class: Non-Exempt
Supervisor: Lending & Education Director

Position Summary: Under the direction of the Lending and Education Director the Intake Specialist will be responsible for helping clients complete their application and ensuring all information is gathered and accounted for. The Intake Specialist will help ensure HUD guidelines are being met with all new clients and client files. The Intake Specialist will handle registrations for all classes as well as support marketing efforts for the loan and education team.

Duties and Responsibilities

1. Maintain confidentiality and common courtesy with fellow employees and the public.
2. Underwrite and assist in processing consumer loans.
3. Meet with applicants to obtain information for loan and grant applications and to answer questions about the process.
4. Follow up with applicants to secure data necessary based on Loan policies to perform a sound loan review based on underwriting requirements.
5. Maintain knowledge of consumer, mortgage, and business loan policies to answer client questions.
6. Maintain knowledge of counseling and education opportunities to answer client questions.
7. Review loan applications to ensure that they are complete and accurate.
8. Communicate with clients seeking HUD housing counseling to gather needed information and assist in scheduling counseling.
9. Triage HUD clients based on urgency and follow related policies and procedures.
10. Maintain up to date and complete group education registration and attendance files and documents.
11. Maintains orderly files on each account with complete and accurate details of all correspondence.
12. Refer clients to the proper staff member based on needs and availability.
13. Perform other duties as assigned by supervisor.

Required Skills and Abilities

- Candidates must have excellent oral communication skills, be interpersonal, and be extremely organized.
- Ability to maintain confidentiality, follow directions and procedures, and work in a professional manner at all times.
- Ability to communicate with clients effectively to gather any needed information and documentation.

- Ability to read and follow policies and procedures and maintain internal controls.
- Ability to adapt in order to present and disseminate information in an easily understandable manner to individuals at various educational levels.
- Proficiency in the use of Microsoft Office applications, and database file systems. Must be able to develop proficiency in loan software programs
- Position may require travel, including local and overnight, flexibility in work hours to accommodate business needs, and reliable transportation to perform job duties.
- Must be self-motivated; be able to work independently, and to positively motivate others.
- Must have strong team environment experience and ability to communicate well with team objectives, deadlines and task participation.
- Excellent organizational, time management, and planning skills.
- Willingness to accept new challenges and opportunities.

Minimum Qualifications (Required Knowledge & Experience)

- Knowledge of FNCF's mission and educational/loan product offerings.
- Previous successful customer service positions of minimum of two years
- Possess a combination of education experience; skills, aptitude and trainability, which in the judgment of hiring the Executive Director deems skills are sufficient for the performance of duties
- Knowledge and working application of all regulatory requirements applicable to data collection, reporting, and approving loans
- No convictions for a felony or misdemeanor involving dishonesty or breach of public trust
- Willingness to comply with FNCFs drug testing policy
- Valid driver's license, and proof of valid insurance

Benefits

- 401K plan match up to 2%
- Health Savings plan contributions, or partial premium reimbursement
- Short-term & long-term disability
- Life Insurance

To Apply: Please send resume and completed applications to Fncfadmin@ho-chunk.com or Stephanie.Clark@ho-chunk.com . For more information check our website at firstnationsfinancial.org.
