Loan Processor
404 Euclid Avenue, Ste. 271
San Diego, CA 92114
http://accessity.org/
(619) 795-7250

About Accessity:
The mission of Accessity is to open doors of financial opportunity to those with historically less access to capital and business support: entrepreneurs of color, women, immigrant, and low-to moderate-income entrepreneurs, enabling them to build a prosperous business and livelihood for their families, while also strengthening our communities with job retention/creation. With headquarters in San Diego, Accessity is a certified Community Development Financial Institution that offers small business loans up to $100,000 and access to a community of support to small business owners across Southern California (San Diego, Los Angeles, Orange, San Bernardino, Riverside and Imperial Counties). Please visit www.accessity.org for more information.

Job Overview:
The Loan Processor reports to the Client Experience Manager and is a part of the intake team. The position supports the lending and business development departments while providing the highest level of customer service to loan applicants and prospects. The Loan Processor assists incoming applicants with any questions and ensures that the application and all required documents to complete a loan packet are for the lending team to process. The Loan Processor also assists potential applicants who may have questions about starting the loan application process with Accessity.

Loan Processor responsibilities:
1. Process a pipeline of incoming applications at different stages to include:
    a. Prompt calls to applicants with their eligibility status
    b. Consistent and proactive follow up with applicants to gather necessary documentation to complete their loan file
    c. Review of all required documents to ensure accuracy prior to sending to underwriting
    d. Input of client information into Salesforce and TEA software database
2. Process new applications
3. Updates to loan processing tracker via Salesforce to maintain current snapshot of applications in intake
4. Use Salesforce for pipeline management, updating notes and setting tasks for follow-up on pending files
5. Import all leads and applications from Salesforce into TEA software database
6. Answer phone calls and assist walk-ins from prospective borrowers inquiring about Accessity's loan program
7. Assist clients with referrals to outside support sources when they do not meet initial screening criteria, or work with other lending support staff to respond to client needs
8. Work closely with the Business Development Officers in collecting documents and keeping them informed of the status of their originated applications
9. Support with processing Rapid Loan applications
10. Application Importing
11. Lead Generating Dashboard back-up
12. Perform other duties as assigned

Qualifications:
1. **Bilingual required (English/Spanish).**
2. Bachelor's or associate's degree or related experience required.
3. Customer service experience.
4. Excellent communication skills, written and oral.
5. Strong attention to detail while managing multiple tasks.
6. Financial and quantitative skills.
7. Strong organizational and time management abilities.
8. High level of initiative and motivation.
9. Can work effectively in a cohesive team environment as well as independently.
10. Experience working with financial documents, including profit & loss statements, balance sheets and tax returns and business entity documentation.
11. Proficient computer skills.
12. Salesforce experience a plus.

Work Environment:
Work is generally performed in an office setting with a moderate noise level. Currently this position is hybrid in-office and remote. The Accessity team is a passionate and professional group that loves supporting local small businesses to make their dreams and economic stability grow!

Benefits/Pay:
We offer a warm, inviting work environment with a culture that values diversity and inclusion, innovation, integrity, accountability, and mindfulness, and offers a competitive pay and benefits package. Our team is driven by our mission to create social and economic justice for all.

- Medical/Dental/Vision/Chiropractic & Acupuncture Packages
- Employee Assistance Program and Hotline
- Aflac supplemental insurance
- 403 B retirement plan and company match
- 12 paid holidays
- Paid time off (PTO)/Sick package
- 1 Birthday & 1 volunteer paid day off
- Term life/disability insurance
- Company-paid training and professional development

The pay range for the position of Loan Processor is between $19.50 - $21/hr.

Physical Demands:
While performing the duties of this job, the employee regularly is required to sit; use hands to finger, handle, or feel; and talk or hear. The employee occasionally is required to stand; walk; and reach with hands and arms.

To apply:
Please submit cover letter and resume to mpartida@accessity.org . Due to the number of resumes received we may not be able to respond to every candidate, but qualified candidates will be contacted to schedule the next steps.

Accessity is an equal opportunity employer.