

# JOB POSTING NOTICE



**POSITION:** Loan Assistant III

**LOCATION:** Plano, TX

**SCHEDULE:** Monday - Friday 8:00 am - 5:00 pm

## POSITION PURPOSE

To perform administrative and clerical duties inherent in the processing of loans using knowledge of bank practices, policies, and organization. This position offers the customer the highest degree of service and promotes all Alliance Bank's products and services.

## SKILLS, KNOWLEDGE, AND PHYSICAL REQUIREMENTS

- Personify Alliance Bank's mission statement of *The best in all we do*.
- Ability to read, write, and speak the English language; bilingual helpful.
- Four (4) years' experience in banking or job-related field and two (2) years' training and/or education in field or a combination of education and experience providing equivalent knowledge.
- A minimum of 3 years' experience at Alliance Bank is preferred.
- Must possess excellent interpersonal communication skills and have the ability to deal with and respond to employees, customers, third party vendors, and salespersons with tact, diplomacy, and a sense of urgency.
- Ability to meet performance expectations and job description functions for the role of a Loan Assistant II.
- Ability to perform administrative functions.
- Ability to present a professional demeanor at all times.
- Ability to handle stressful situations through organization.
- Ability to operate basic office equipment including a PC with job related software.
- Ability to handle bank and customer transactions with a high level of confidentiality.
- Knowledge of state and federal regulations.
- Knowledge of Alliance Bank's loan policies, procedures, products, and services.
- Schedules are prepared based on business need and subjects to change at any time. This may include the need for evenings, weekends, or holiday coverage.

## ESSENTIAL FUNCTIONS AND BASIC DUTIES

- Personify Alliance Bank's mission statement of The best in all we do.
- Promotes Alliance Bank's culture through all interactions modeling the Alliance Bank way of Customer Experience.
- Handle clerical phases of loans. Including but not limited to:
  - Assisting customers with rates, terms, and options
  - Giving appropriate applications and initial disclosures
  - Reviewing applications and other required documents for completeness
  - Running credit reports
  - Preparing denial packages
- Serve as liaison between customer and officer or underwriter in providing information to each as required.
- Prepare necessary forms and letters to assist officers in working past dues and exceptions; maintaining current listing to ensure that the officer has such information.
- Prepare maturing loan report to assist the officer with preparing for future renewals.
- Prepare monthly branch financial reports for the Market President to review.
- Screen telephone calls and maintain appointment schedule.
- Prepare loan documents, new and renewed, and all supporting documents.
- Responsible for inputting and verifying imaged data for their respective branch and/or other branches.

**This is a summary of the requirements and essential functions.  
The full job description is available upon request.**

**Qualified applicants should submit a resume to [HR@Alliancebank.com](mailto:HR@Alliancebank.com).**



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