



Loan Client Success Coordinator

Full time position

Reports to: CEED Lending Manager

This position is responsible for the daily administration of the loan portfolio for CEED Lending. It also requires extensive customer contact. The essential functions include: (1) providing pre and post loan closing Technical Assistance (T.A.) to our existing as well as potential loan clients; (2) maintain the accuracy of the portfolio management system; (3) managing the collections process; (4) managing the Portfolio Quality Review process. CEED Lending is a program of the Great Lakes Women's Business Council.

Responsibilities:

- Attend loan closings (virtually at present) to begin full Technical Assistance (T.A.) Assessment relationship with loan clients.
- Work closely with loan clients within our portfolio providing T.A. anticipating problems and being prepared to provide business owners with assistance or identify support options.
- Complete T.A. reporting forms consistently and be prepared to make available for review.
- Responsible for keeping loan documentation files current, well organized and up to date (including discharging liens, mortgages, UCC's, vehicle titles etc.).
- Input of loan payments as determined.
- Create/maintain monthly, quarterly and annual reports.
- Manage collections process in accordance with CEED Lending's policies.
- Evaluate records of delinquent loans and recommend loan modifications to the loan officers based upon borrowers' financial capacity including a review of earnings, payment history, and net asset levels.
- Assist Loan Officers with analyzing portfolio trends and identify portfolio vulnerabilities by interpreting data on payment trends, borrower financial ratios, pricing, economic influences, along with other factors affecting the portfolio.
- Attend regular loan staff meetings and loan committee meetings.
- Compile and coordinate documentation for loan review as necessary (audit prep).

Requirements:

- Bachelor's degree in Accounting/Finance/Business or minimum of 7 years of work experience in small business, community, or mission-based lending.
- Ability to work independently and in a team environment.

- Comfortable with technology platforms such as Zoom, WebEx, Microsoft teams, etc.
- Ability to manage multiple tasks effectively and efficiently under minimal supervision.
- Good interpersonal skills and ability to work well with diverse constituents.
- Proficiency with MS Office is required with an emphasis on Excel.
- Strong attention to details.
- Knowledge of and commitment to community development preferred.
- Experience working with diverse range of communities and people.

Compensation:

- Salary will be commensurate with the skills and experience of the selected candidate.

Work environment/conditions:

- Remote temporarily.
- The position may require some irregular hours, such as overnight, weekends, overtime, etc.

All resumes and inquiries should be directed to:

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