



Job Description

BUSINESS LOANS ADMINISTRATIVE ASSISTANT

Community Futures Boundary (CFB) has offices located in Grand Forks and Greenwood. All employees may be required to provide services in either location. Mileage re-imbursements will not be applicable for work performed in either of these two locations.

JOB SUMMARY:

The Business Loans Assistant provides administrative support services to the Loans department through the provision of database and file management, reporting, and collection of confidential information. This is a part time position, 2 days per week (14 hours), in the Grand Forks office.

REPORTING:

The Business Loans Administrative Assistant reports directly to the Business Analyst.

CORE RESPONSIBILITIES:

TEA Database Administration and File Management

- Set up new files within the business & loan modules
 - Prepare amortization schedules
- Maintain ongoing file management
 1. Enter client contacts
 2. Record and maintain monthly client requirements
 3. Interest rate changes
 4. Maintain current contact information, update as required
 5. Process PAD information/VOID cheque to GFCU
 6. Collection of financials & any documents as needed for annual file review
 7. Maintain diary TEA & Manual cards for expiries and renewals
 8. Send bulk emails on TEA (as required) including monthly Leading Edge Newsletter
 9. Filing
 10. Closing and archiving all client files

Correspondence

1. Report new loan information to client
2. Send out monthly & semi-annual loan statements
3. Send letter to client when loan is paid out and request security be released
4. Other correspondence as required

General Loans Administration and Reporting

1. Provide information to loans client
2. Prepare Legal loan documentation
3. Email monthly/annual loan statements to clients
4. Maintain monthly loans reports and any additional reporting as required
5. Report clients on monthly basis to Equifax – Commercial and Consumer
6. Register/change security on PPSA - BC online
7. Record Projects utilizing Board Reports
8. Assist in obtaining credit checks & assigning loan numbers for all applications
9. Maintain monthly loan stats as required

10. Semi-annually review all files in preparation for audit
11. Assist with annual audit requirements
12. Ensure monthly, quarterly and annual reporting:
 - o Business Numbers annually to WD
 - o Forestry Fund semi annually to Province of BC
 - o Monthly loan approvals and disbursement reports to the Business Loans Manager, Loans Committee and CFB Board
13. Prepare Loan Application Packages

Monthly Board Meetings

- Generate monthly Loan TEA reports
 - o Loan Balance Report
 - o Loan Delinquency
 - o Loans Paid Out
- Compile Work BC report Summary
- Print all reports into Board Package Binders and Upload to DropBox
- Organize Caterer – Prepare board room for meeting

Other

- Assist, coordinate and participate in special events as required

SKILLS AND QUALIFICATIONS:

- A minimum 2 years' experience in an administrative role within a legal, banking or administrative office environment
- Excellent written and verbal communication skills
- Proficient computer skills (Excel, Outlook, MS Word)
- Demonstrated ability to manage complex database management systems

CRITICAL SUCCESS FACTORS:

- Exceptional organization skills and detail oriented
- Ability to work both independently and as a team
- Ability to adapt to changing priorities, meet deadlines and multi-task
- Alignment with and ability to display Organizational core values of: teamwork, accountability, communication, innovation, performance and spirit.

ACCOUNTABILITY:

The Loans Department must meet key performance measurement targets as set by Western Diversification. Each member of the team must ensure they execute the above responsibilities and demonstrate full participation attaining those benchmarks.

All employees of Community Futures Boundary work with information, processes, or data that must be kept confidential in order to protect the interest of the client, program funders and the corporation. To ensure confidentiality, employees are expected to refer to CFB's Policies and Procedures Manual, and WorkBC specific policies.

_____ *Print Name & Sign*

_____ *Dated*