



## Customer Service Representative - Austin

*PeopleFund seeks a dynamic and energetic individual to work with our Senior Loan Officer in the preparation of loan packages while providing exceptional customer service to prospects, clients and partner. PeopleFund is a non-profit community lender and business education provider. This position reports to our Senior Loan Officer.*

### Duties and Responsibilities:

- Assist loan applicants from application to closing by phone, in person, online, and email.
- Maintain loan application database MMS.
- Regularly update and maintain loan production pipeline.
- Maintain and track program specific goals and initiatives, including community impact.
- Assist with SBA loan processing.
- Verifies accurate records are maintained in customer files.
- Gather required loan documents from clients and partners.
- Attend and participate in lending events and outreach activities in support of PeopleFund's mission.
- All other duties as assigned.

### Preferred Skills:

- Outgoing and professional personality.
- Experience in customer service.
- Experience in loan processing, accounting, and reading financials preferred.
- Able to multitask and handle competing demands.
- Enthusiasm for organization and a tidy work environment.
- Excellent written and oral communications skills.
- Software Proficiency: Microsoft Office Professional and Email.
- Spanish language a plus.

*This position is a salaried, paid position and includes benefits (medical, dental and vision with HSA, FSA, and DC FSA options available, and employer paid life insurance). It also features a monthly cell phone allowance, 401k match, use of company vehicle for work purposes, and professional development opportunities. Some travel (within Texas) may be required <25%.*