

Customer Service Representative - Dallas

PeopleFund seeks a dynamic and energetic individual to work with our Loan Officers 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 Regional Lending Manager.

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.