



Loan Administration Assistant

Position Location: Austin, TX

Start Date: Immediately

Company Background

PeopleFund creates economic opportunity and financial stability for underserved people by providing access to capital, education and resources to build healthy small businesses. PeopleFund believes that healthy small business growth is the key to economic recovery and development and that every person, no matter their background or economic situation, has the ability to become a successful entrepreneur and job creator given access to resources they need. Our goal is to give people the opportunity to turn their talents into a sustainable livelihood and achieve financial stability for themselves and their families. We inspire, educate, fund, and elevate clients on the path to prosperity and the American Dream.

Job Description

This role supports loan administration and finance teams through reporting, loan management, portfolio, and operations assistance. The role leads new loan setup within PeopleFund's portfolio management CRM, works with clients for loan advances and payments, updates and manages funding spreadsheets and loan-oriented recordkeeping, issues funding emails, and addresses client financial concerns. This role supports multiple departments in assessing best practices and products for PeopleFund's clients, and collaborates with the accounting and finance department to provide accurate reports and impact metrics.

Primary Tasks

- 🌱 Responds to Loan Administration Manager for guidance and direction
- 🌱 Prepare & apply loan advances & payments
- 🌱 Updates funding spreadsheets and send funding correspondence
- 🌱 Deposit checks
- 🌱 Obtain & file paid invoices for client fundings
- 🌱 Maintain insurance cancellations and follow-up on reinstated policies
- 🌱 Prepare loan administration reports as needed
- 🌱 Address customer concerns & requests
- 🌱 Maintain accuracy of loan data and impact measurement within PeopleFund databases
- 🌱 Prepare paid in full letters
- 🌱 Update information and schedule payments within online payment portal (Payix)
- 🌱 Manage loan documentation through various digital and print systems
- 🌱 Input loan modifications and client record updates within PeopleFund databases
- 🌱 Attend and participate in PeopleFund events in support of PeopleFund's mission
- 🌱 All other duties as assigned

Requirements

- 🌱 Experience in customer service, loan processing, finance, and financial analysis
- 🌱 Undergraduate degree in accounting, finance, business or related field
- 🌱 Bilingual desired, but not required

Salary DOE. Benefits include medical, vision, dental, life insurance, and 401K match. Apply online at

<http://peoplefund.org/join-our-team>