



Mission | PeopleFund creates economic opportunity and financial stability for underserved people by providing access to capital, education, and resources to build healthy small businesses.

Customer Service Representative – Ft. Worth

Description: 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 partners. PeopleFund is a nonprofit community lender and business education provider. This position reports to our Regional Lending Manager.

Duties and Responsibilities Include:

- Assist loan applicants from application to closing by phone, in person, online, and email
- Maintain loan application database
- 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
- Other duties as assigned

Requirements:

- High School Diploma/GED
- Outgoing and professional personality
- Able to multitask and handle competing demands
- Enthusiasm for organization and a tidy work environment.
- Excellent written and oral communications skills.
- Bilingual in Spanish

Preferred Skills:

- Bachelor's degree preferred
- 2+ years customer service experience
- Experience in loan processing and accounting
- Experience in financials
- Software Proficiency: Microsoft Office and Email.

Employee Benefits - PeopleFund provides the following benefits for employees:

- Medical, dental, vision, and life insurance coverage. PeopleFund pays up to 100% for employee only
- Paid time off and 12 paid holidays
- 401 (k) retirement plan with match
- Flexible Spending Account (FSA) and Health Savings Account (HSA) available for qualifying medical pans and expenses
- Dependent Child Care Spending Account available to employees who qualify
- Monthly cell phone allowance (if configured and used to receive and send PeopleFund calls and emails on personal device)

Standard Terms of Employment:

- Salary commensurate with experience
- Employment offers are subject to acceptable driving record, credit, background, and reference checks
- Work week time of 9:00am to 6:00pm, Monday through Friday. Exceptionally, may require support to events and meetings outside business hours
- Texas is an at-will employment state

To Apply Please Submit the Following:

- Resume
- Cover Letter - review the job description, indicating in your cover letter why this opportunity is important to you. PeopleFund is committed to staff development and the organization offers the selected candidate a unique opportunity to grow with it.

Applications will be accepted and reviewed on a rolling-basis.

To Apply go to: <https://peoplefund.org/employment/>

True to our Mission, PeopleFund is committed to recruiting and retaining a diverse staff, and to creating a respectful workplace anchored in a deep, shared commitment to diversity, equity and inclusion: we are proud to be an equal opportunity employer. PeopleFund welcomes applications from all qualified persons, including underrepresented groups who can contribute to our Team's capabilities as we work together to meet the needs of underserved communities.