

## **Administrative Assistant Job Posting and Job Description**

**Date:** March 6, 2024  
**Branch:** Pleasanton  
**Reports to:** Branch President / Branch Manager/ Loan Officer  
**Salary:** Based on qualifications

**Job Summary:** Perform various secretarial duties and administrative support to Branch President and/or assigned loan officer (s) and when called upon to assist other officers. Provide services to depository customers to include but not limited to, opening new accounts, cross-selling of products and other associated services.

### **Essential Functions:**

- Assist Branch President and loan officer (s) in processing new and renewed loans, including but not limited to collecting all necessary documentation to complete the loan application process, obtain credit reports and assist with preparing loan packages for loan committee meetings.
- Work with loan officer (s) to resolve loan exceptions and to ensure bank's interests are protected.
- Assist with collecting past due loan payments.
- Process various types of transactions such as wires, loan payments and other services provided by the bank.
- Provide efficient and courteous customer service, cross-market products, and services to generate new business for the financial institution when appropriate.
- Open and maintain new accounts including DDA, Savings, IRAs and Certificates of Deposit offered by the financial institution.
- Assist with online banking, debit card transactions and disputes.
- Assist others in waiting on customers, answering telephones, and performing other duties as assigned by management.
- Adherence to all policies and procedures of the Bank including BSA/AML.
- Attendance and punctuality are essential job functions.

### **Required Education, Experience and Skills:**

- High school diploma or its equivalent.
- Previous banking experience preferred, but not required.
- Previous Lending Assistant experience is preferred.
- Fiserv – Precision/Director knowledge a plus.
- Abrigo/Sageworks knowledge a plus.
- Excellent verbal and written communications skills for effective interactions with customers.
- Must be self-motivated with good organizational skills and work in a team environment.
- Ability to work independently with minimal supervision.
- Proficient in Microsoft Office programs.

- Strong organizational and customer service skills.
- Excellent phone skills.
- Ability to handle multiple tasks and deadlines efficiently.
- Ability to exercise discretion and independent judgment.
- Successful completion of all required compliance training.

**Physical Requirements:**

- Ability to sustain close vision for long periods of time.
- Ability to sit for long periods of time.

**Contact Information:** Contact Renee Lyssy at [rlyssy@southtrust.com](mailto:rlyssy@southtrust.com) or 830-281-8108, ext. 1507 or Liz Urbanczyk at [lurbanczyk@southtrust.com](mailto:lurbanczyk@southtrust.com) or 830-216-2216, ext. 3331.

**Applications will be accepted until the position is filled.**

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