



**Functional Title of Position: Loan Originator Assistant - Unlicensed**

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**Reports to (Functional Title): Branch Manager**

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**Department/Branch: Field**

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**Location: Field**

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**GENERAL SUMMARY:**

This position may be used for unlicensed Loan Originators working towards or waiting for approval from the state regarding licensing. They will be responsible for providing administrative support to loan originators within assigned branch.

**PRINCIPAL FUNCTIONAL RESPONSIBILITIES:**

- Primary duty may be to become a licensed loan originator for assigned branch.
- Assist in gathering loan material for assigned loans files.
- Responsible for the development of leads for a specific loan originator.
- Become familiar with Envoy's process, policies and procedures.
- Ability to learn, or have past in-depth experience, in mortgage banking process, with a preference in residential mortgage banking.
- Complete knowledge of Envoy's products, systems and competitive advantages.
- Superior ability with required communication, organizational and computer skills.

*Under no circumstances will the Marketing Representative engage in any of the following tasks:*

- *Quoting rates;*
- *Offering or negotiating the terms of a mortgage loan;*
- *Taking a mortgage loan application;*
- *Any other activities that require a Loan Originator License.*

***THIS JOB DESCRIPTION IS NOT INTENDED TO BE ALL-INCLUSIVE. THE INCUMBENT WILL ALSO PERFORM OTHER REASONABLY RELATED BUSINESS DUTIES AS ASSIGNED BY MANAGEMENT.***

**MINIMUM QUALIFICATIONS:**

- 3-5 Years of experience in similar setting
- Knowledge of Microsoft Excel, Word and Outlook
- A Bachelor's degree is preferred
- Excellent customer service skills and working in a team environment
- Excellent interpersonal, verbal and written skills are a must
- Must be a self-starter who is reliable, detail oriented and the ability to resolve issues
- Strong relationship building a must, along with strong written and verbal communication skills
- Ability to analyze issues and create effective resolutions, while managing multiple projects at one time.



**PHYSICAL REQUIREMENTS:**

- The employee must occasionally lift and/or move up to 25 pounds.
- Specific vision abilities required by this job include close vision.
- While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear.
- The employee is occasionally required to stand; walk; climb or balance and stoop, kneel, crouch, or crawl.

**JOB DESCRIPTION ACKNOWLEDGED BY:** \_\_\_\_\_

**DATE OF ACKNOWLEDGMENT:** \_\_\_\_\_