

Luther Burbank Savings Job Description

Job Title: Document Technician
Department: Mortgage Banking
FLSA Status: Non-Exempt

Job Number: TBD
Reports To: Chief Residential Mortgage Banking Officer
Last Revision: 9/15/2011

Summary: The Document Technician draws and prepares all loan documents and ensures completeness of loan files.

Essential Duties and Responsibilities

- Draws and prepares loan documents to maintain daily minimum expected production levels.
- Reviews title policy, appraisal and escrow instructions for correct property address, vesting and legal description.
- Determines and documents discrepancies between the file and loan origination system.
- Verifies rates, origination charges and loan fees are accurate.
- References GFE and TIL and ensures loan is in compliance.
- Assists in logging in signed loan document packages and assign to funders.
- Assists funders in stacking and reviewing signed loan documents.
- Meets and exceeds expected turn times and quantity standards per company policy.
- Maintains turn times and provides highest level of customer service to all internal and external customers.
- Adheres to all applicable compliance regulations, including BSA, BPA and Right to Financial Privacy.
- Demonstrates a commitment to Fair Lending.
- Other duties may be assigned.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

- Customer Service - Responds promptly to customer needs; Responds to requests for service and assistance.
- Oral/Written Communication - Speaks clearly, professionally in positive or negative situations. Writes clearly and informatively.
- Mathematical Ability – Accurately completing mathematical equations.
- Problem Solving - Identifies and resolves problems in a timely manner.
- Organizational Support - Completes administrative tasks correctly and on time, supports organization's goals and values.

Education and/or Experience

High school diploma or general education degree (GED), and at least three years mortgage document preparation; or equivalent combination of education and experience. To perform this job successfully, an individual should have knowledge of appropriate software and work well in a fast-paced environment.

Physical Demands

While performing the duties of this job, the employee may be required to sit or stand for extended periods of time. In order to utilize the data processing system, the employee must be able to physically use a keyboard/mouse and walk to and from workstations. The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision and ability to adjust focus.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.