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## **Mortgage Transaction Coordinator**

The Mortgage Transaction Coordinator manages inbound and outbound contact with Credit Union members, branch staff, and Home Loan Consultants. This person acts as the “point of contact” with all stakeholders regarding loan status and missing documentation.

### **Key Essential Responsibilities**

1. Reviews loan requests and coordinates receipt of all necessary loan documentation from borrower(s) or designated branch employees.
2. Answers inbound loan status calls from borrowers and branch staff. Proactively communicates loan status and coordinates receipt of any missing loan documentation for submission to underwriting team.
3. Manages all communication between borrowers, branch staff, and underwriting team. Effectively communicates credit union loan process flow and turn-time expectations.
4. Quotes interest rates and loan closing costs.
5. Works closely across the organization with different teams to ensure proper levels of service.
6. Performs various administrative and clerical tasks to assist with processing of loans in a timely manner, including, but not limited to updating Loan Origination System, issuing loan disclosures, and prepares loan closing packages when requires.
7. Promotes and maintains a positive work atmosphere by communicating in a manner consistent with professional standards to work effectively with members, co-workers, management and vendors.
8. Keeps abreast of industry developments including, but not limited to changes in regulations and technology.
9. Ensures adherence to company policies and procedures and Banking/Credit Union Regulations.
10. Performs additional duties as required.

### **Scope**

The Mortgage Transaction Coordinator works under the direction of the Mortgage Operations Manager exercising limited independent judgement and decision making within standard practices and procedures and requires moderate supervision.

### **Essential Skills, Knowledge and Requirements**

1. High school diploma or equivalent. Bachelor’s degree preferred.
2. A minimum of 2 years’ real estate lending experience working as a mortgage loan processor, underwriter, loan officer or loan officer assistant. Must understand mortgages and home equity loan program guidelines, workflow, disclosures as well as underwriting and processing standards.
3. Must be able to successfully complete the registration process as a mortgage loan originator (MLO) with the Nationwide Mortgage Licensing System and Registry (NMLS). The ability to annually renew and maintain registration throughout employment.
4. Strong communication skills, proven customer service skills with excellent organizational and prioritization skills.
5. Self-motivated with excellent interpersonal skills with the ability to effectively work across the organization and with members.
6. Experience using Loan Origination Systems and Microsoft Office as well as working knowledge of basic office equipment such as printers, scanners, fax machines and copiers.