**Assistant Manager**



**Loan Servicing**

*Effective: 1/2025*

***Waukesha State Bank Profile****: Waukesha State Bank is one of the largest locally owned and independent community banks in Wisconsin, with 14 full-service offices located throughout Waukesha County. Our strength as a successful and growing financial services provider is rooted in a long-standing commitment to serving the community with a personalized, one-on-one approach to banking and an emphasis on customer service. We provide a broad array of products and services to assist businesses and individuals in achieving long-term financial goals, such as commercial & small business lending, retail banking, residential mortgage lending, investment services and wealth management services. We also have three divisions, Payroll Complete, offering payroll processing services, Prairie Trust, offering trust and estate services, and Waukesha Investments, offering financial and retirement planning services*

**Position Summary:** The Loan Servicing Assistant Manager is responsible for providing excellent, friendly service to internal and external customers of Waukesha State Bank while managing the daily workflow of the department and completing daily/weekly/annual tasks. Loan Servicing tasks support our existing portfolio of consumer, mortgage, and commercial loans. This position requires strong organizational & technical skills and the ability to maintain a strong working knowledge of regulations, bank policies and procedures.

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| Reports To: |  Loan Servicing Manager | Schedule: |  Monday-Friday 8:00 AM-5:00 PM |
| FLSA Status: |  Non-Exempt | Work Model: |  Onsite |
| Status/Hours: |  Full-Time | Travel Required? |  No |

**Job Duties & Responsibilities**:

* Deliver service excellence to all external customer inquiries - handling escalated calls with patience, empathy and knowledge.
* Provide internal support to the Retail, Commercial and Mortgage Loan Teams relating to loan account questions and issues.
* Work with senior management on complex loan situations to resolve issues in a timely manner.
* Coordinate appropriate meetings with partner departments and the Loan Servicing Manager to ensure the timely exchange of information to meet departmental standards.
* Direct daily workflow of Loan Servicing tasks, ensuring completion of work assigned, and elevating any concerns or issues to the Loan Servicing Manager.
* Assist the Loan Servicing Manager with the coaching and development of the Loan Servicing Team.
* Provide and coordinate training for the Loan Servicing Team.
* Update training materials, procedures, and trackers as needed to ensure departmental compliance.
* Serve as a resource on Loan Servicing Projects assigned by the Loan Servicing Manager.
* Prepare property evaluations and zoning checks and order property inspections & update evaluation spreadsheet calculations monthly.
* Perform daily and monthly balancing for all investor general ledger accounts.
* Review loan related non-post and exception reports, making corrections as needed.
* Manage the charged-off loan process.
* Act as the back-up administrator for all Loan Servicing systems including but not limited to; e-Oscar, Transunion, ServiceLink & EMV, and Simplifile.
* Oversee the check-back process to ensure loan information is accurate and loans function correctly.
* Conduct annual maintenance and research tasks on existing loans, including tracking delinquent property taxes and escrow processing.
* Other duties as assigned by Loan Servicing Manager.

**Qualifications & Skills:**

* 3 years’ recent experience in Loan Servicing.
* 1 year of coursework in accounting or commiserate experience in balancing GL accounts.
* 1 year of leadership experience in a loan operations environment.
* Knowledge of Fiserv’s Premier (ITI) software program preferred.
* Strong working knowledge of bank regulations, policies and procedures.
* Ability to effectively lead a team of five Specialists at varied experience levels.
* Ability to adjust communication style to effectively deliver messages to customers, business partners and team.
* Excellent time management and organizational skills with ability to prioritize and meet deadlines.
* Excellent analytical skills, accuracy, and attention-to-detail.
* Proficiency in Microsoft Word & Excel.
* Excellent verbal & written communication and customer service skills.
* Desire to work in community bank environment and always represent WSB in a professional and ethical manner

**Additional Requirements:**

* Employment with Waukesha State Bank is contingent upon successful completion of a criminal background check and drug screen.

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| ***Physical Demands*** | *The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.**While performing the duties of this job, the employee is frequently required to sit, talk or hear via phone or in person; and use hands to handle, or touch objects or controls such as a keyboard. The employee is occasionally required to stand or walk. On occasion the incumbent may be required to stoop, bend, kneel or squat. The employee must occasionally lift up to 25 pounds. Specific vision abilities required by this job include close vision, color vision, depth perception, and ability to adjust focus.* |
| ***Work Environment*** | *Only those present in a normal office setting, no known significant hazards.*  |

***The above statement reflects the general details necessary to describe the principal functions of the occupation described and shall not be construed as a detailed description of all the work that may be inherent in the occupation.***

***Internal Use Only:***

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