

Community Development Corporation of Utah

JOB TITLE: Intake Specialist

REPORTS TO: Lending Manager

FLSA STATUS: Salaried Position

PAY RANGE: \$43,840-\$47,840 (DOE/Certification)

JOB SUMMARY:

CDCU is a non-profit organization and community development financial institution (CDFI) whose mission is to strengthen our communities by empowering all Utahns through access to affordable housing and financial security. CDCU offers a variety of products services including: financial and housing counseling and education, affordable homes for sale, real estate representation, homes for rent and federal and private: mortgage, consumer lending.

The Intake Specialist will be part of a team that is responsible for managing a statewide mortgage assistance program to be launched in October 2022 and is the first point of contact for households applying for the program. The Intake Specialist will answer questions about the program through email, text and phone. Other responsibilities include collecting documentation from applicants, assembling applications, sending program disclosures and other items for signature, determining priority of applications, coordinate translation services when necessary, add notes into service files in Salesforce and ensures applications are fully completed. This position reports to the Lending Manager. This is a salaried position with no commissions or bonuses, but offers excellent flexibility and benefits including health, dental, health savings account, 12 paid holidays, paid time off, and a plan.

Because this is a federally funded program, it is estimated that it will operate for three to four years. Applicants should be aware that this position may be eliminated at any time due to the nature of the funding.

Primary Responsibilities & Expectations:

- Receives general incoming calls, mail, faxes, and email inquiries and responds in a timely manner within 24-48 hours
- Consistently input and track ALL client data and interactions: log calls, create contacts, email clients, enter notes, tag relevant staff in Salesforce database
- Reviews applications for completeness and initially processes online submissions in a timely manner within 24-72 hours with a sense of urgency

- Maintain client pipeline and follow-ups in a timely manner establishing constant communication until application is ready to move to processing
- Enters client data and creates services files manually in Salesforce for paper application submissions
- Collect all documentation, send disclosures and assemble complete applications.
- Assist loan processors and counselors in outreach to applicants, sending documents, follow-up on requests for information.
- Provide quality customer service to current and potential clients
- Extremely responsive to internal/external customer requests and strive to exceed expectations
- Effective communication skills and time management to accomplish daily, weekly, monthly goals tied to funding
- Punctual to office and to team/staff meetings and proactively participates in the discussions
- Good sense of urgency to complete tasks and prioritize time sensitive matters
- Highly motivated, positive, flexible and a good team player
- Perform other duties as assigned in support

WORK ENVIRONMENT:

PHYSICAL/MENTAL DEMANDS: Office environment with some travel

HOURS: 40 hours/week. Mon-Fri 8-5.

This job description in no way states or implies that these are the only duties to be performed by the employee incumbent in this position. Employee will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments.

This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.