



Example of Credit Advisor Job Description

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Our company is growing rapidly and is looking for a credit advisor. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for credit advisor

- Present a professional image from a personal and professional level that will be beneficial to customers, credit union partnerships and the Company
- Follow a professional, broad based sales process in accordance with the Company's procedures
- Follow regulatory securities requirements and strictly adhere to all Company policies
- Follow regulatory policies and procedures of ethical market conduct
- Follow the Company and regulatory guidelines for maintaining client files
- Meet or exceed the Company's minimum program production standards along with a product mix of business consistent with the needs of your customers
- Attend all required training along with additional opportunities to attend informational meetings scheduled by the Company
- Adjudicate files with Single Name Exposure up to \$1MM
- Use sound judgment and employ a balanced approach to asset growth and portfolio quality
- Apply specialized knowledge and experience to support CAMs and their clients

Qualifications for credit advisor

- 5 years of experience working with senior leaders
- 2 years of experience in communications planning, including department

- Minimum production history of \$200,000 annually over the last three years and preferably client assets of at least \$15 million
- Commitment to Total Needs Bases Sales approach
- Verifiable commission history over the last three years and preferably client assets of at least \$15 million
- LUTCF, CLU, ChFC or CFP designation preferred