



Example of Credit Specialist Job Description

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Our innovative and growing company is looking to fill the role of credit specialist. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for credit specialist

- Provide accurate information as needed by customers, sales, and credit
- Manages and oversees loan/deposit portfolios
- Recommend potential deposit, trade, treasury management, foreign exchange, private banking, asset management, and other services to our Relationship Managers (RM) prospects
- Work with credit analyst in reviewing existing credits
- Perform other administrative duties required for the maintenance of a portfolio of clients
- Assist in the development of junior bankers, credit analysts, and relationship associates
- Ensure the portfolio administration and risk management of each client relationship is in compliance with established EWB credit policy, procedure and business strategy commercial and regulatory guidelines
- Verify and accurately data enter various lease and loan applications in credit processing system
- Posting daily USD/CDN credit card payments
- Complete online Lockbox payments in order for the payments to post to the correct customer account

Qualifications for credit specialist

- Reviews status of delinquent accounts and initiates collection action

- Ability to read and comprehend simple instructions, create correspondence and memos
- Strong communication skills due to contact with customers and employees at various locations
- Effectively present information one-on-one and in group situations with upper management