



Example of Relationship Assistant Job Description

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Our growing company is looking to fill the role of relationship assistant. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for relationship assistant

- Compliance with the requirements of the applicable laws and regulations, including the bank's AML / BSA / OFAC / CIP program
- May supervise a team of Relationship Assistants to ensure the efficient operations of a Regional Corporate Banking office
- Monitor delivery dates and project next steps with the Graphics department in order to meet client expectations
- Assist in day to day management of client portals and task the appropriate departments with additional project requirements
- Prepares and/or oversees the preparation of loan applications and supporting documents and loan information sheets for new and existing accounts
- Works with Relationship Manager in monitoring customer accounts and loan portfolios to detect changes that might affect their credit standing
- Updates trending reports and makes recommendations to Relationship Manager for approvals and/or changes to new or existing credit lines
- Monitors compliance with loan agreement covenants and reporting requirements
- Prepares Problem Credit Monitoring Requests and keeps Credit Plus current with no outstandings greater than 30 days, maintains loan files, Buker Tax Analysis and Moody's Risk Analyst
- Interacts with clients/prospects Acts as liaison between Relationship Manager and other departments, as required

Qualifications for relationship assistant

- High School Degree or GED equivalent and a minimum of 2-5 years' experience as a commercial loan administrative assistant with experience in most aspects of underwriting/processing/closing commercial loans for a similar type of financial institution or equivalent combination of education and experience
- Be able to deal with non-routine matters, such as special projects, with minimum specific instruction
- Able to solve practical problems and deal with a variety of variables in situations where only limited standardization exists, and to interpret a variety of instructions furnished in written or oral form
- Create and manage purchase orders in Ariba, Schwab's purchasing system, and maintain files of work orders and other necessary documentation
- Register and escort any visitors with security via the Schwab visitor system, including assisting senior level executives visiting the Austin facility