

## **Legal Secretary/Conveyancing Clerk - Job Standards**

Job Standards include: (Note: this is a representative list only - complete list provided with purchase)

### KNOWLEDGE OF WORK:

- Has a sound understanding of the organization philosophy, particularly regarding lending operations
- Knows all forms, procedures, and requirements involved in processing mortgage and business loans
- Knows, understands and can apply routine lending procedures (i.e., debt ratio calculation, obtaining credit bureau report, obtaining required documentation, financial reports, verification of legal data and documentation)
- Understanding legal terminology regarding all types of conveyances. (Mortgages, assignment of book debts, debentures, assignment of shares). Knows what information is needed, how to obtain it and fully complete the credit request documentation in accordance with regulation and standard procedure
- Is familiar with state and federal regulations concerning lending for different kinds of business or personal credit (i.e., Regulation Z)
- Knows aspects of title work, notary work, and guaranteeing signatures
- Knows organization policies, procedures and services

### QUALITY OF WORK:

- Obtains all required documentation and processes loan documentation error free
- Prepares documentation within the processing deadlines established by the Loan Officer (95% of the time) for the type of loan being processed.
- Prepares, checks, and completes all documentation, error free
- Supports the Loan Officer in a conscientious, efficient and productive manner
- Provides accurate information on policies, procedures, and title information to both loan interviewers and customers, when required
- As required, cross sells organization services (i.e. insurance)

### QUANTITY OF WORK:

- Processes the required documentation for a minimum of \_\_\_\_ loans each month
- Demonstrates word processing skills at the rate of \_\_\_\_ words per minute, error free
- Utilizes form letters to assist processing; resulting in high volume processing
- Keeps elaborate file records of documentation status on each loan being processed
- Makes calls to customers to complete documentation in accordance with required standards

### ORAL COMMUNICATION:

- Is a good listener; asks questions to clarify intent and content
- Expresses self clearly; uses correct grammar and appropriate lending terms and expressions
- Considers feelings of others; is always respectful and considerate
- Is aware of the messages body language transmits and eliminates negative non-verbal messages
- Uses non-discriminatory, unbiased language, without profanity or sexual connotations

### WRITTEN COMMUNICATION:

- Writes clear and concise notes to customers and staff
- Uses proper grammar at all times; asks others to read correspondence to improve it
- Handwriting is fully legible, in file notes, documentation, and inter-office communication
- Work is well documented, in the form and context required
- Proof reads all correspondence before signing and sending out