



Commercial Loan Assistant

Location: N. Ridge Rd | Wichita, KS

Role Summary

To assist loan officers with all activities associated with commercial lending, including responding to customer needs for information and assistance with their banking business. This role ensures every interaction is accurate, timely, and customer-focused, reflecting our promise of banking that truly backs our customers. The Commercial Loan Assistant helps build lasting relationships and supports the bank's mission to serve our community with integrity and trust.

Ready to Join Our Team? If you're passionate about delivering dependable service, building meaningful connections, and contributing to a culture rooted in care and collaboration, we'd love to hear from you. Apply today and help us continue Legacy Bank's tradition of trust and excellence in serving our community.

Apply online at: <https://legacy.bank/careers/> or email your resume and cover letter to hr@legacy.bank.

Responsibilities

- Assist loan officers with preparing worksheets and gathering information for loan requests to forward to the loan operations department for processing including ordering title insurance, appraisals, flood certificates, taxes, credit reports, etc. Review completed loan documentation for accuracy according to loan worksheet requests. Coordinate title company closings with the title company including but not limited to reviewing settlement statements, preparing documents and loan proceeds and coordinating delivery of closing packet to the title company. Assisting loan officers with the closing of both new and renewed loans when loan officer is not available. Responsible for sending title commitments to commercial loan officers assisting in fulfilling all requirements.
- Responsible for assisting loan officer in collecting necessary documents on all new loan customers to meet both CIP and beneficial ownership requirements including assisting loan officer in reviewing entity operating agreements, bylaws, etc. Verify CIP and beneficial ownership info on existing customers and make updates as needed in accordance with regulations and internal standards. Responsible for collecting and reporting HMDA reportable information. Responsible for clearing exception reports including CIP and beneficial ownership.
- Communicate and provide support to loan customers regarding their loans; Prepare loan advances, pay invoices, process payments, wires, etc. at customer and officer request.
- Assists loan officer in obtaining current financials, final title policies and insurance on collateral on ongoing basis.
- Create and update lot developments in the lot books.
- Daily Overdraft report for commercial customers and other duties as assigned.
- Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.
- All employees are expected to actively promote Legacy Bank to existing and prospective customers in order to obtain and build the bank's customer base and thereby enhance Legacy Bank's growth and profitability.

Qualifications

- High school diploma or equivalent required.
- Six months to two years of similar or related experience, including time spent in preparatory positions.
- Proficiency with banking systems, loan processing software, and Microsoft Office Suite preferred.
- Strong attention to detail for reviewing financial documents and ensuring compliance will put you ahead.
- Ability to manage multiple priorities and meet deadlines in a fast-paced environment will put you ahead.

Key Attributes for Success

- **Relationship-Oriented:** Builds trust and positive connections with customers and team members.
- **Dependable & Accurate:** Delivers work with precision and consistency under deadlines.
- **Organized & Efficient:** Prioritizes tasks effectively and maintains clear documentation.
- **Adaptable Problem-Solver:** Responds calmly to challenges and adjusts to changing priorities.
- **Clear Communicator:** Provides information in a professional, customer-focused manner.
- **Team Player:** Collaborates openly and supports colleagues to achieve shared goals.

Who We Are

Since our founding in Colwich, Kansas nearly 140 years ago, Legacy Bank has established itself as a strong community partner and a preferred place of employment. Now in our fifth generation of leadership, our focus remains on our people and delivering relationships, service, and solutions to our area communities.

Our Benefits

At Legacy Bank, our employees exemplify sound work ethics, dedication, and a desire to improve lives. We consider our team members our most valuable asset and prioritize their well-being. We recognize their contributions and support them with comprehensive benefits, fostering both their personal happiness and long-term success.

Our Benefits include: health insurance (Legacy pays a portion of the employee's premium), 401(k) with employer matching, accrued vacation and sick leave, paid personal day, health & dependent care flexible spending account, and more.

ADA Requirements

Physical Requirements

Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 10 lbs. Must be capable of climbing / descending stairs in emergency situation. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

Working Conditions

Must be able to routinely perform work indoors in climate-controlled shared work area with minimal noise.

Mental and/or Emotional Requirements

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Equal Opportunities

Legacy Bank is an Equal Opportunity Employer and does not discriminate against employees or applicants based on race, color, religion, sex/gender, national origin, disability, age, or any other category protected by law.