

Job Description:
Client Services Officer

Status: Non-Exempt, Full-Time, In-Office
Supervisor: Senior Investment Officer
Revised: 2/15/2024

Position Purpose:

The Client Services Officer provides front line support to applicants and borrowers, supports the program teams with daily tasks, projects, and off-site errands, and maintains the safety and security of the office

Essential Functions:

The Client Services Officer provides the warm first impression to our clients and applicants that sets the stage for our client-focused approach to our work. This team member proactively assists each of the program teams by connecting them with clients, and providing daily support in the achievement of our mission

Job Duties:

GENERAL OFFICE SUPPORT

- Greets clients and assists them with initial inquiries, then provides a warm handoff to program officers; offers hospitality to client; provides exceptional client service in person, by phone, and by email
- Ensures all inquiries and communications are managed kindly and efficiently
- Enforces strict safety protocols by managing secure access to the building
- Maintains all client and shared spaces in clean and orderly condition

INVESTMENT TEAM SUPPORT

- Fills out and submits inquiry forms for new clients making contact by phone or email
- Performs basic client screening, informing clients of suitable products and services, and scheduling intakes with investment officers
- Accepts and accurately routes loan applications and supporting documents to investment officers
- Maintains the applications@ email inbox, responding to and routing messages as appropriate, with the same level of professionalism and kindness expected with all client interactions

PORTFOLIO TEAM SUPPORT

- Accepts client payments, provides receipts, accurately fills out associated documentation, submits documentation to portfolio team, and places payments in safe
- Prints and mails communications and documents, which may include driving to the post office for certified mailing

- Perfects collateral at the Department of Motor Vehicle and County Clerk and Recorder's office
- Prepares loan closing documents
- Notarizes loan closing documents as needed

BUSINESS CONSULTING TEAM SUPPORT

- Maintains the calendar of Technical Assistance events
- Updates organizational contacts lists
- Provides basic technical assistance to clients

COMMUNICATIONS TEAM SUPPORT

- Orders print collateral at the direction of the Communications team
- Maintains print collateral and communications supplies in good order
- Checks event kits in and out, ensure kits are full stocked at check in, and maintains inventory of materials

OPERATIONS/FINANCE TEAM SUPPORT

- Schedules outside vendors to provide service and support at the direction of the Operations team
- Monitors and manages copier and hospitality supplies
- Manages logistics of in-office events including team lunches, meetings, and celebrations, as well as partner events which may include ordering food, preparing meeting spaces, ensuring resources are available
- Places orders for office supplies and maintains inventory in an organized manner

OTHER DUTIES

Manages other duties in support of the larger team as assigned by Executive Director and direct supervisor