

CLIENT SERVICES SPECIALIST

DETAILS

Location:
Kennesaw, GA

Salary Range:
Entry

Position Type:
Full Time

Travel Required:
None

HR Contact:
Madeline Wade, mwade@ioufinancial.com

Will Train Applicant:
Yes

JOB DESCRIPTION

The primary function of this position is to work closely with IOU Financial merchants who are in the final stage of the loan process. This person will direct the merchant through the closing process via a recorded closing call. The Specialist will also handle any post-closing merchant questions including but not limited to balance and payoff amount inquiries. The Specialist will be cross-trained to perform any and all closing and servicing duties as well as provide coverage for vacations or other absences. This position will communicate frequently with account executives, brokers, risk management and production team members to accomplish its duties and responsibilities.

RESPONSIBILITIES

- Conduct closing calls with IOU Financial merchants clarifying all terms and conditions of the loan as well as assisting with any system help needed.
- Maintain closing call calendar.
- Assist merchant with logging in to accept funds as well as performing any identity verifications if needed.
- Complete pre-closing due diligence checklist.
- Recognize and pro-actively resolve potential problems during the loan closing/acceptance process.
- Assist merchants who may contact you directly for future needs based on service related issues and work with other departments to ensure customer satisfaction.
- Communicate with sales/ops regarding any merchant concerns or closing issues.
- Assist merchant with any post-closing needs as it relates to current loan account.
- Maintain timely and accurate records of all interactions with customers and internal departments.

QUALIFICATIONS

- Must have excellent oral and written communication.
- Must be a self-starter, detail oriented, able to work independently as well as in a team environment.
- Have the ability to work effectively and pro-actively in a cross functional team environment to move renewal expansion process to higher conversion rate.
- Possess excellent time management skills and the ability to prioritize opportunities to ensure effective and timely follow up.
- One to three years' experience working in financial services and customer service and sales environments.

PREFERRED QUALIFICATIONS

- Basic understanding of computer technology in a business environment.
- Working in fast paced environment.
- Loan processing experience a plus.
- Effective communication skills both verbally and in writing with superiors, colleagues, and individuals inside and outside the Company.
- Effective analytical and problem-solving skills.

ABOUT IOU FINANCIAL

IOU Financial is a leading online lender specialized in helping small businesses with a healthy cash flow. Providing a unique approach to lending through an advanced, automated application and approval system, IOU Financial is able to accurately assess applicants' financial realities. Small business loans are available of up to \$150,000 to qualified applicants in only 24-48 hours. Speed and transparency make IOU Financial a trusted alternative to banks. IOU Financial operations is based in metro Atlanta, Georgia with headquarters in Montreal, Canada and publicly traded (TSX-V: IOU). For more information, visit <https://IOUFinancial.com>.

IF YOU ARE INTERESTED IN APPLYING, PLEASE EMAIL MADELINE WADE, ATTENTION:
[Human Resources, Client Services Specialist](#)