



Equipment Leasing Documentation Manager  
Walnut Creek, CA

At Bank of the West, we've surrounded ourselves with some of the brightest, talented and most devoted professionals in the financial services industry to form a solid and secure foundation. We currently have an excellent opportunity in Walnut Creek, CA for an experienced professional to manage all aspects of the lease documentation unit.

Specifically, you will:

- Hire, train, counsel, and manage staff
- Provide excellent customer service to all brokers, discounters, lessees, bank customers, vendors, and bank employees
- Review, process and approve all fundings of lease and loan paper
- Approve all commission invoices and vendor payments, including handling of sales and use tax in support of brokers and discounters located nationwide and bank customers' leases located in all states with a bank presence
- Negotiate/approve all vendor agreements and amendments or addenda to lease and loan documentation
- Draft/implement all unit procedures, including continuous training of both internal staff and active brokers/discounters on documentation policy for indirect lease business
- Oversee the handling of all end-of-lease activity to ensure that legal requirements are followed per the agreements and that the bank is receiving the correct fair market value
- Continually automate processes, including enhancements to process management database software for indirect transactions
- Conduct/oversee the due diligence review of documentation for the high volume of leases purchased through periodic portfolio purchases
- Oversee the tracking of the Bank's assets, including managing the follow-up and tracking of DMV titles and Uniform Commercial Code filings
- Automate/reduce the volume of paperwork in order to streamline the process of communication and review to meet a quick funding turnaround time

This position calls for:

- A Bachelor's degree
- 7+ years of leasing and contract experience
- 3+ years of experience managing/supervising a documentation area
- Thorough knowledge of all bank policy and procedures
- Extensive knowledge of legal and accounting terms for all lease and loan type structures
- Proven expertise with software accounting and tracking systems
- The ability to review and approve complex lease and loan transactions
- Strong management, customer service, training, problem-solving, and communication skills

For immediate consideration, visit [www.bankofthewest.com](http://www.bankofthewest.com), click on 'Employment', search under 'Walnut Creek, CA', and apply online for the '[Equipment Leasing Documentation Manager](#)'.

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Bank of the West  
Community Focused Banking