



Job Title:

Assistant Manager Equipment Finance

Job Summary:

Support the objectives of the Equipment Finance Group through the coordination of workflow and portfolio maintenance. Provide support to division manager and sales team.

Duties and Responsibilities:

1. Provide direct sales support to Equipment Finance Specialists coordinating daily activities to achieve sales goals.
2. Monitor credit activity, including analysis of application and credit bureau information and submit completed package to credit for decision and act as a liaison between clients, sales and credit. Process managed through the use of multiple systems.
3. Communicate and manage business flow with credit analyst, credit administrator and loan ops.
4. Manage the flow of transactions to the loan ops department; including preparation of documents and obtaining completed funding packages.
5. Communicate with sources on an administrative basis, keeping them current on policies, procedures and pricing.
6. Assist in preparation and maintenance of divisional policy and procedure manuals.
7. Assist with portfolio maintenance including collection, tax. Filing and residual monitoring.
8. Perform duties & responsibilities specific to department functions & activities.
9. Performs other duties & responsibilities as required of assigned by supervisor.
10. Responsibilities include the following: 1) adhering to and complying with the applicable, federal and state laws, regulation and guidance, including those related to Anti-money laundering (i.e. Bank Secrecy Act, US PATRIOT Act, etc.) 2) adhering to Bank policies and procedures, 3) completing required training, 4) identifying and reporting suspicious activity to the AML Officer, and 5) knowing and verifying the identity of any customer(s) that enters into a relationship with the Bank.

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