



**Job Title:** Collateral Exception and Administration Specialist  
**Department:** Commercial Closing & CRE Administration  
**Location:** Pittsburgh, PA

**Job Summary:**

The Collateral Exception and Administration Specialist will support the C&I/Commercial Real Estate Closing process and CRE Administration workflow ensuring quality and productivity standards are met. This position will require thoughtful approaches to client engagement and experience and will work closely with external clients and internal partners (including Relationship Managers, Credit/Portfolio Managers, Legal, Compliance/Risk, and Bank Operations) to deliver a best-in-class experience for our commercial prospects and clients.

**Primary Job Responsibilities:**

- Manages the document exception process, including creating, reviewing and editing exceptions based on policies and procedures using core system(s).
- Ensures the accuracy and timely distribution of exceptions reporting.
- Manages the NextGen relationship and works to improve the exception/tickler process and reporting as well as liaises with IT and other business lines to seek out process improvement opportunities as it relates to that system.
- Provides oversight of the UCC (historical) filing and continuation process.
- Manages the AFR (insurance tracking) vendor relationship – ensuring, accuracy of reporting, transmission of files and process enhancements to improve workflow.
- Provides oversight of UCCs filed in the name of TSCB including the filing of all (historical) UCCs, ensuring they are continued in a timely manner
- Manages the CoreLogic relationship for real estate tax tracking – providing reporting and informational updates to the sales organization
- Ensure the policy premium is made for Life Insurance Policies that secure TSCB loans from Northwestern Mutual clients.
- Serves as the Operations Point of Contact for specific audits as defined by management and ensures that all audit reporting requests are fulfilled within established timelines.
- Ensures that all work is processed timely and accurately and that all service levels are maintained.
- Provides management with accurate and meaningful metrics including both volume and key risk indicators for exceptions and collateral monitoring functions.
- Trains new colleagues on key collateral monitoring systems and functionality.
- Performs various projects, as required by manager.

**Education and Experience Requirements:**

- Bachelor's degree or commensurate combination of education and experience.
- Minimum of three years of financial services experience with exposure to marketable securities and / or loan administration.
- Familiarity with brokerage statements and other financial documentation typically associated with a loan file.
- Familiarity with Baker Hill Services Advisor product preferred, but not required.

**Essential Skills and Abilities:**

- Excellent verbal, written, and interpersonal communication skills.
- Knowledge and understanding of trust and custody services.
- Ability to navigate multiple loan service applications and utilize search tools to locate and research data.
- Ability to work independently and provide team support in a production-based environment.
- Strong organizational and time management skills.
- Ability to work overtime as necessary.
- Must be able to lift boxes up to 20 lbs.

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