

**Justine PETERSEN Housing and Reinvestment Corporation**  
**Intake Associate**



Justine PETERSEN Housing and Reinvestment Corporation's mission is to connect institutional resources with the needs of low- to moderate-income families so they can build long- term assets. Justine PETERSEN (JP) achieves this goal through its products, which include credit building and financial education, homeownership preparation and retention, and micro-enterprise lending and training. Our people-centered financing breaks barriers and economic divides by building equity, wealth, and financial freedom for diverse families and neighborhoods. JP is a Missouri not-for-profit 501(c)(3) corporation and wholly owns a Community Development Financial Institution (CDFI), certified by the

U.S. Department of Treasury

**Key Responsibilities**

Ensure clients interested in Justine PETERSEN's products and services have the best possible experience coming in our "front door" whether that's by phone, internet, or the literal front door. Help clients understand the process for getting them connected with a counselor as quickly as possible. Support the intake system to make sure we're promoting stellar customer service and efficient and effective service delivery.

**Job Duties:**

1. Field daily inquiries from clients relating to JP's products and services
  - a. Answer calls from clients looking for housing services, credit building services, and loans.
  - b. Explain process for obtaining JP products and services
  - c. Verify contact information and send appropriate link to client for scheduling and applying
  - d. If client is already in the intake process—look up status in Vistashare and update client.
  
2. Support Credit Building Counseling appointment readiness
  - a. Schedule clients seeking credit building counseling in available credit building counseling slot on calendar, mark as tentative
  - b. 1 day before the credit building appointment, confirm client has signed credit release, confirm appointment on team calendar. If client hasn't signed release, follow-up. If unable to reach client mark the appointment as cancelled.
  
3. Loan Counselor Assignment
  - a. Monitor completion of client intake documents.
  - b. Create e-folders for each new client and populate with client documents in the appropriate sub-folder.
  - c. Pull credit reports.
  - d. Analyze client loan readiness using the pre-screening Matrix
  - e. If applicable, run SBA score.
  - f. Assign client to a counselor based on loan readiness, location, and loan size request.
  - g. Send email to counselor with client assignment and email client with counselor assignment and contact information
  - h. Complete Vistashare record with notes and update Counselor Assignment Spreadsheet.
  
4. Intake Pipeline Management
  - a. Weekly, review report of intake pipeline
  - b. Send weekly emails with pipeline to Loan Counselors—followup on updates that need to be made to pipeline in Vistashare
  - c. Merge duplicate records
  - d. Coordinating with counselors move "inactive" clients out of pipeline

e. Move e-folders for “inactive” clients on F drive to “inactive” folder

5. Other duties as assigned

**This job might be for you if:**

You think on your feet. You like learning new things, and you can learn them quickly. When things change, you know how to roll with the punches.

You’re a self-starter. You are self-confident. Armed with knowledge of your job and organization you are always looking to make things better for your clients and team.

You are a problem solver. You might not know the answer yourself, but you’re going to figure it out.

You pay attention to details. As far as you’re concerned, anything worth doing is worth doing right, every single time. You stay focused, and nothing falls through the cracks on your watch.

You might not be a tech wiz, but you learn new programs quickly.

You communicate clearly. You can explain just about anything to anyone, and you’re comfortable communicating via email and on the phone.

You can work in an open and lively office.

You love working with people, you’re methodical, and friendly. You take pride in moving things to completion.

You have at least two years of relevant work experience.

**How to apply:**

Email your resume and cover letter to [TWare@justinepetersen.org](mailto:TWare@justinepetersen.org) . In your cover letter, please provide a roadmap for your resume and experience: What parts of your resume should we pay particular attention to? Why are you a great fit for this position? In particular, what is your experience providing customer service?

Hourly Employee

Job location: St. Louis Office

Salary: \$18 an hour

Please visit our website at [www.justinepetersen.org](http://www.justinepetersen.org). EOE