CLIMB Fund Overview:
The CLIMB Fund is a vibrant and growing not-for-profit Community Development Finance Institution (CDFI) headquartered in Charleston, SC. Over its 42-year history, the organization has developed a strong reputation and balance sheet as one of the state’s leading lenders for economic opportunity and social justice. The CLIMB Fund is rapidly expanding its lending and seeks a Client Intake Coordinator to support its growing footprint and impact in communities across South Carolina.

Position Summary:
The Client Intake Coordinator is a member of the CLIMB Fund’s lending team and is responsible for the initial intake of prospective borrowers and aiding them with submittal of complete loan applications. Additionally, this position is tasked with supporting other CLIMB Fund lending activities, community outreach, and operations.

Responsibilities:
• Fields inquiries from prospective borrowers, track in an organized fashion, and guide them through the loan application process while communicating clearly with all stakeholders and providing excellent customer service.
• Ensures the loan applications packages are complete and ready for lending team review.
• Assist lending team in acquiring additional information from applicants if/when needed.
• Provide regular and detailed internal reports on volume of loan requests and in-process applications.
• Greet visitors and answer phone calls as needed.
• Manage office facility and supply needs and communicate regularly with external vendors.
• Other duties as assigned in support of CLIMB Fund lending and operations.

Requirements:
• Bachelor’s degree from an accredited four-year college or university.
• At least 2 years’ experience working in a formal office setting.
• Strong time management, organizational skills, and attention to detail.
• Excellent customer service abilities along with strong written and verbal communication skills.
• Impeccable personal integrity and ability to maintain confidentiality of borrower data.
• Strong proficiency in Microsoft Office Suite, CRM, and creative design software tools.

Preferred Qualifications
• Degree concentrating in finance, business management, communications, or related field.
• Familiar with lending, particularly small business lending.
• Able to comprehend financial statements.
• Experience/knowledge of local businesses, communities, and geography.
• Excited about new opportunities, working with diverse communities, & continued learning.
• Fluency in multiple languages.

Benefits Include
• Salary to commensurate with experience, expected range: $35,000-$50,000
• Generous retirement plan match along with health, dental and vision insurance
• 20+ days of Paid Time Off (PTO) per year, including holidays, and a flexible schedule

To apply, submit a resume and cover letter to jon@climbfund.org. The CLIMB Fund is an is an equal opportunity employer and strongly encourages applications from people of color, persons with disabilities, women, and LGBTQ+, and other underrepresented applicants.