

SEEDCOPA Position Description



TITLE: Relationship Manager

REPORTS TO: Seedcopa Managing Director

PRIMARY FUNCTION: This position will be responsible for originating loans, focusing on achieving loan goals, credit quality, and superior customer service. In addition to credit structuring and analysis, this position will interact with borrowers, financial institutions and strategic partners.

KEY RESPONSIBILITIES

- Responsible for working with incoming business development calls.
- Preparation of the Seedcopa Initial Assessment and the ability to work with partners and borrowers to understand the request and structure loans.
- Ability to conduct engagement meetings and document checklist from these meetings.
- Maintain and continue to foster existing relationships with banks/credit unions, economic development partners, legal and accounting practices and commercial realtors.
- Ability to develop new relationships in both existing and new markets.
- Responsible for updating and maintaining the Salesforce CRM system.
- Contribute ideas to the sales and marketing efforts of Seedcopa, including social media efforts.
- Attend regular online or in-person training sessions to keep abreast of program changes and improvements.
- All other duties as assigned.

REQUIRED SKILLS/KNOWLEDGE/EXPERIENCE:

- Bachelor's degree in Finance, Accounting, Business or a related field and at least 3 years of commercial lending experience or equivalent experience.
- Knowledge of SBA and government loan programs is preferred.
- Experience with Microsoft Office suite, Salesforce (or other CRM), and loan/internet software.
- Strong interpersonal and communication skills with the ability to balance production with credit quality.
- Attention to detail and organization skills are a must have.
- Qualified candidates will possess a commitment to a strong culture of collaboration and cooperation.

Working Conditions: This role requires regular on-site presence, with the potential for off-hours work as projects and work as required. However, once training is complete a partially remote hybrid work option, consistent with organizational policy, is available.

Benefits: Seedcopa provides a highly competitive benefits package to full-time employees inclusive of dental, health and life insurance, paid time off and an employer matched 401(k) program.

Time Requirement: Full-time

Date: October 1, 2025

Contact: If interested, please contact Michelle May at michelle@workplaceharmonyhr.com.

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