Danielle Ortiz

Loan Assistant

Loan assistant with 1.5 years at a Phoenix credit union, supporting consumer lending for 4 loan officers. Prepares loan documentation, orders credit reports and keeps every file complete before underwriting review. Works in Excel, Word and the Microsoft Office Suite daily and gives members clear customer service by phone and in the branch.

danielle.ortiz@email.com

(602) 555-0148

Phoenix, AZ

linkedin.com/in/danielleortiz

Experience

Loan Assistant

04/2025 - Present

Saguaro Valley Credit Union — Phoenix, AZ

Member-owned credit union with 9 branches and a $1.1B loan portfolio.

- Assemble loan documentation packages for about **90** auto and personal loans a month for 4 loan officers.
- Run credit reports, verify pay stubs and insurance, and flag missing items before files go to underwriting.
- Coordinate member loan signings in Outlook and return status calls within 4 business hours on average.
- Track open conditions in an Excel log, cutting files returned for missing documents from 14% to 5% in one year.

Member Service Representative

06/2023 - 03/2025

Sonoran Federal Credit Union — Tempe, AZ

Branch member service role at a 5-branch credit union.

- Processed 100+ deposits, withdrawals and loan payments per shift and balanced the cash drawer on 99% of shifts.
- Opened 25 new checking and savings accounts a month, completing data entry in the core banking system.
- Answered loan rate questions at the counter and referred 12 members a month to the lending team.
- Drafted member letters and account notices in Word using approved credit union templates.

Certificates

Notary Public Commission

08/2025

Arizona Secretary of State

Skills

- Loan Documentation
- Credit Reports
- Consumer Lending
- Data Entry
- Excel
- Word
- Microsoft Office Suite
- Outlook
- Customer Service
- Attention to Detail

Education

Associate of Applied Science

05/2023

Mesa Community College

Mesa, AZ

Business Administration