

**JOB TITLE:** SENIOR INVESTMENT ANALYST**DEPARTMENT:** DEVELOPMENT**DIVISION:** WESTERN DIVISION**FLSA:** Exempt**DATE OF REVISION:** May 2016

## 1. PRIMARY FUNCTION

The primary function of the Senior Investment Analyst is to assist the Regional Vice President with the financing, asset management and disposition of multifamily properties. Assist in the development and implementation of operating budgets, underwriting standards, and other procedures for the development/acquisition, ownership (operations) and disposal of multifamily properties. Monitor status of properties in all phases of development.

## 2. ESSENTIAL DUTIES AND RESPONSIBILITIES (Should be a minimum of 5-8)

- **Asset Management:** Support the Regional Asset Manager and Onsite Management Team with the development and implementation of lease-up strategies for new developments including marketing, pricing and operations. Provide operational oversight by reviewing monthly property financial statements and reports provided by Onsite Management. Prepare supportive analysis for lenders and equity investors as needed.
- **Financial Modeling:** Maintain and improve JPI's proprietary Development/Acquisition and Reforecast Models. Update models to reflect various capital structures and market terms.
- **Financial Analysis:** Support development teams as needed with underwriting acquisition and development opportunities to include financial modeling, land and property valuations, investment analyses (IRR, sensitivity tables, etc.), and joint venture structuring.
- **Due Diligence:** Support the transaction due diligence and closing processes. Collect due diligence materials, utilize information to adjust underwriting, and assist team members to facilitate the closing of a transaction.
- **Capital Markets:** Prepare investment summaries and presentations for existing and pipeline deals. Draft summaries and provide detailed analysis to JPI Executive Committee, Prospective Lenders and Equity Investors.

This is intended to describe the major requirements and the major duties which comprise the framework for this job. It is **not** to be construed as an exhaustive statement of all the duties, responsibilities or requirements. JPI Employment Services, LLC retains the discretion to add or change the job duties at any time.

- **Dispositions:** Provide forecasts and proposed timing to commence disposition process. Source and assist in selection of broker and review broker opinions of value. Review letters of intent to assist in selection of buyer. Coordinate due diligence and closing process.
- **Investor Relations:** Build and maintain relationships with lenders and equity investors. Provide monthly updates and prepare ad hoc reports requested by investors and lenders.
- **Special Projects:** Support the San Diego and Corporate teams as necessary.

### 3. **NON-ESSENTIAL DUTIES AND RESPONSIBILITIES (Could be 1-3)**

- Help train new analysts

### 4. **KNOWLEDGE AND EXPERIENCE REQUIRED**

#### A. EDUCATION:

- Bachelor's degree in Business Administration with a major in Finance, Accounting or Real Estate
- MBA or relevant Master's degree preferred

#### B. LICENSES OR CERTIFICATIONS REQUIRED:

#### C. RELATED WORK EXPERIENCE: []

- |                          |                    |                                     |                  |
|--------------------------|--------------------|-------------------------------------|------------------|
| <input type="checkbox"/> | None               | <input type="checkbox"/>            | 4 - 6 years      |
| <input type="checkbox"/> | 6 months to 1 year | <input checked="" type="checkbox"/> | 7 - 9 years      |
| <input type="checkbox"/> | 1 - 3 years        | <input type="checkbox"/>            | 10 or more years |

**Describe the nature of the prior experience** (what type of work must the incumbent have been performing for the last x number of years? (i.e., analysis, industries, positions, typing, computer skills, etc.):

- Expert working knowledge of Microsoft Office applications including: Excel, Word, PowerPoint, and MS Visual Basic (ability to create/modify macros).
- Incumbent should have at least 5 years prior experience within investment management, real estate development or asset management and have a thorough understanding of financial analysis and how to calculate and interpret return metrics (Cap Rate, IRR, Return on Cost, Residual Value, etc.)

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**D. OTHER CONSIDERATIONS** (*communications, interpersonal skills, etc.*):

- Expert knowledge of Microsoft Office applications including: Excel, Word and PowerPoint
- Strong communication skills including writing/composition, oral, and listening skills
- Some knowledge of corporate finance, accounting and valuation methodologies
- Must possess a positive attitude and work well with team members in an open, professional work environment
- Strong ability to conduct online research in an efficient manner
- Multi-tasker with ability to prioritize
- Attention to detail and organized
- Logical thinker with strong desire to learn skills that improve efficiency (ex. Macro formulation, database creation, programming tools)
- Proactive
- Flexible / Versatility
- Analytical
- Integrity
- Demonstrated initiative

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