

CDC Small Business Finance Corp
Job Description

Job: Portfolio Analyst
Reports to: Portfolio Manager

Date: March, 2014
Exempt Status: Exempt
Hours: Full Time
Location: San Diego

Primary Function:

Analyze and coordinate complex servicing actions on funded SBA loans.

Essential Functions:

- Analyze the financial impact and eligibility of servicing requests such as subordinations, assumptions, non-occupancy, change in ownership, release of collateral, substitution of collateral and other servicing actions.
- Coordinate with borrowers, lenders, SBA servicing centers, and escrow companies to complete servicing transactions.
- Provide information to internal staff such as Loan Officers related to servicing actions.
- Assist Portfolio Manager with loan work-outs and liquidations.
- Answer general servicing action questions

Required Qualifications:

- Minimum of 5 years of experience in commercial loan servicing actions with a minimum of 1 year handling servicing actions on SBA 7(a) loans.
- Proficiency with MS Office applications.
- Ability to prioritize, multi-task, and remain organized.
- Strong written and verbal communication skills.
- Experience in financial analysis/credit underwriting is a plus.

Education:

Bachelor's degree in finance or accounting or equivalent experience in servicing of commercial loans.

Physical Requirements:

Ability to lift 10 lbs