



POSITION TITLE: Senior Financial Analyst

FLSA CLASSIFICATION: Salary/Exempt

REPORTS TO: CFO

THE ANNEX GROUP'S MISSION STATEMENT

To create a positive impact with the people who live, work and are involved in our communities.

The Annex Group is seeking qualified individuals searching for careers not jobs and can operate with a team first approach. If you are someone who wants to assist in our mission and make an impact, come join our team.

POSITION OVERVIEW:

The Real Estate Financial Analyst is responsible for assisting in the development process from inception to closing with focus on market research, underwriting, financing procurement and negotiations.

ESSENTIAL FUNCTIONS:

Essential functions include the following. Other duties may be assigned.

- Secure debt and equity placement for Section 42 housing, workforce, and market rate apartments.
- Handle due diligence processing for transaction closings with internal team members, external financial partners/legal counsel, and ownership.
- Use Excel pro forma to review projects, provide feedback to other staff regarding transactions, etc. Activities will include data entry, adjustments and alterations to model, and reports to development team and management regarding project feasibility.
- Review and Provide input and assist legal department in negotiation of financing and partnership documents.
- Lead in interim and permanent refinancing options for existing portfolio.
- Create cost/benefit analysis for various projects (e.g. implementation of utility submetering) and financial alternatives
- Create and develop new relationships with lenders and equity investors for all different asset types
- Provide periodic reports to Manager of Finance detailing progress in meeting goals.
- Collaborate with the Project Directors to implement and track project timelines for their respective closings
- Complete internal market research and to identify viable markets and land sites.
- Analyze and screen potential acquisitions for match with underwriting criteria.
- Other duties as assigned.

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Bachelor's degree (B.A./B.S.) or equivalent
- Advanced degree (MBA, MS, etc.) desirable or an interest in pursuing advanced degree or professional certificate preferred (Chartered Financial Analyst, Certified Public Accountant, CCIM, etc.)
- 2 – 6 years of experience in commercial real estate finance with multifamily experience preferred
- Affordable housing or Section 42 background desirable
- Strong command of multifamily housing finance is preferred
- Understanding of financial markets and economic trends is preferred
- Ability to create and maintain financial models is essential

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Frequent walking, standing, sitting within the work area.
- Driving to/from locations for business-related purposes.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The work environment is that of a fast-paced office with minimal to high noise levels.
- This position requires working independently as well as part of a team.
- This position requires verbal and face-to-face contact with others daily.
- Frequent use of a computer is necessary.
- This position requires the use of all general office equipment.
- The position requires client information be maintained appropriately confidential.