



**POSITION TITLE: Financial Analyst**

**FLSA CLASSIFICATION: Exempt**

**REPORTS TO: CFO**

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### **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:**

Include but are not necessarily limited to the following:

- Complete internal market research and financial modeling to identify viable markets and land sites.
- Conduct research regarding zoning and entitlements for potential opportunities.
- Conduct site visits to review site and competition.
- Create and maintain sophisticated financial models and underwrite for multifamily real estate development projects.
- Underwrite land acquisition and development opportunities nationally.
- Analyze and screen potential acquisitions for match with underwriting criteria.
- Perform financial analysis and modeling, verification of income and expense assumptions.
- Perform and evaluate market research analyzing supply/demand, rent/sales, comparables, occupancy, capitalization rates, etc.
- Coordinate due diligence with third party vendors.
- Consult with third-party vendor on real estate tax analysis.
- Coordinate with other departments for design, construction, and property management.
- Participate in the zoning and entitlement process with municipalities.
- Prepare reports for senior management on development progress and critical decision points.
- Prepare materials to present to internal or external stakeholders
- Assist in the financing process with debt and equity groups, finding and editing due diligence materials as requested

### **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.

- Undergraduate degree required/graduate degree is a plus
- 0 – 4 years of experience in commercial real estate finance with multifamily experience preferred
- 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
- Excellent quantitative analysis and financial model skills (using Excel) is required
- Working knowledge of email and MS Office software programs necessary
- Ability and willingness to effectively use other job-related technology tools

### **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.