

Job Description

Job Title: Financial Analyst, Investor Relations
Reports to: Director, Investor Relations and Finance
Department: Capitals/Investor Relations
Prepared by: NN
FLSA: Exempt

General Summary of Position

Assist the Company's Investor Relations and Investments teams by performing analysis, preparing communications, investor materials, and legal agreements related to the acquisition, refinancing, and disposition of multifamily investments. Complete complex investment accounting analyses related to property capitalization. This is a unique cross-functional role that interacts with multiple internal departments (including accounting, investor relations, investments, asset management), external investors, legal counsel, lenders and other important stakeholders.

Essential Responsibilities

The following list of duties and responsibilities is not necessarily all-inclusive. Different or additional duties and responsibilities may be added to this position at the discretion of the Company, depending on business and staffing demands:

Assist with the management of third-party **tenant-in-common ("TIC") investors and investments** including onboarding, closing the investment acquisition or disposition, and managing the ongoing relationship.

- Assist with underwriting and review of third party TIC investors and their principals as part of lender application and underwriting
- Draft executive summaries outlining investment terms and structure related to third party TIC investments
- Manage and monitor the 1031 exchange process for third party TIC investors
- Work with legal counsel and exchange accommodators to arrange necessary legal documents for various investment structures on short deadlines
- Compile post-closing packages for TIC investors

Assist with the **investment** process related to the acquisition, refinancing, and disposition of multifamily investments

- Support Managing Director and Director, Investor Relations with equity structuring, property capitalization, and TIC ownership calculations
- Generate organizational charts by reviewing existing organizational documents and partnership agreements
- Meet closing transaction deadlines and respond to immediate documentation and analysis needs to complete closing
- Complete the Investment Sale (or Refinance) Proceeds Analysis and validate results with the Investment Management software
- Review and support investment offering documents (e.g., Preliminary Investment Overview, PPM, Limited Partnership Agreements, Subscription Agreement, etc.)
- Provide support for institutional JV investments by building IRR waterfall models unique to each deal, review JV Agreements, and perform sensitivity and scenario analyses



Assist with the **investor relations** transactional processes as well as the standard quarterly and semi-annual reporting

- Write letters to obtain investor consents and communicate investment transaction and performance updates regarding property operations, dispositions, and refinances
- Draft investor approval/consent documents and track required signatures
- Review Investor Return Summaries, Distribution Summaries, and other reporting for accuracy
- Evaluate current processes and identify and implement improvements to streamline, automate, and/or increase accuracy
- Provide financial analysis for investor-specific requests

Prior Work Experience and Qualifications

- 1 to 3 years of experience in a professional financial analysis, research and problem solving environment
- Prior work experience with clients that provide sensitive personal financial information
- Previous experience with multifamily or commercial property investments preferred
- Previous experience with the Yardi property accounting platform preferred
- Prior experience reading and interpreting complex legal documents preferred
- Must have demonstrated knowledge and expertise in MS Excel and Office system computer software

Education, Licenses, or Certifications

- Bachelor's degree in finance, accounting, real estate, or a related field
- Completion of education/training in related real estate industry courses preferred

Additional Skills, Abilities, and Characteristics Required:

- Strong research, analytical, and *independent* problem solving skills
- Excellent computer skills with an expert level knowledge of Excel and advanced working knowledge of Word, PowerPoint, and Outlook
- Excellent oral and written communication skills
- Solid understanding of financial statements
- Detail oriented and self-motivated to solve complex challenges in effective, efficient ways
- Business management thinking process to identify, scrutinize, improve and streamline complex work processes
- Strong time management and prioritization skills
- Ability to manage the stress of meeting strict transaction deadlines while handling multiple tasks/projects
- Excellent interpersonal skills, and a resourceful team player

Working Conditions / Physical Requirements:

While performing the duties of this job, the employee is regularly required to sit, use of hands to finger, handle, or feel, reach with hands and arms, talk or hear, count and perform basic arithmetical calculations (add and subtract) and read and write basic English. The employee frequently is required to stand, walk and legally operate equipment. The employee is occasionally required to climb or balance and stop, kneel, crouch or crawl. The employee must frequently lift and or move up to 10 lbs and occasionally lift and or move up to 25 lbs. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus.

This job description does not list all the duties of the job. You may be asked to perform other duties at any time. You will be evaluated in part based on your performance of the tasks listed in this job description.

MG Properties has the right to revise this job description at any time. The job description is not a contract for employment, and either you or MG Properties may terminate employment at any time, for any reason.