



CHEFA

Connecticut Health & Educational
Facilities Authority

JOB DESCRIPTION

Position Title: Senior Portfolio & Client Development Associate

Category/Classification: Exempt / Regular Employee

Reports to: Assistant Director, Client Services

Summary/Objective

The Senior Portfolio & Client Development Associate plays a critical role in supporting CHEFA's bond issuance and financing initiatives, providing essential portfolio management to support proposed bond issuances. The role is also responsible for client development and outreach to build pipelines of potential transactions for CHEFA and CHEFA CDC's bond issuance, direct lending programs, and tax credit programs.

Essential Functions

Portfolio Management:

- Oversee bond issue transaction process from pre-application to closing.
- Collaborate with Client Services team members to gather and analyze all relevant financial data for a client or prospect, to assess an applicant's creditworthiness, including analyzing and summarizing financial statements, historical financial performance, and credit metrics, and identifying risks and mitigants.
- Prepare credit memo submissions and present transactions to the Authority's Board of Directors for approval.
- Review requisite bond loan documents for conformity with approved credit terms and conditions and the Authority's policies. Work closely with the Authority's outside counsel and advisors, as applicable.
- Properly maintain documentation and necessary business records.
- Prepare Municipal Market Overview report and present at Board meetings.

Client Development and Outreach:

- Take the lead role in business development activities, including identifying and cultivating financing opportunities, supporting the development of pipeline

opportunities for bond transactions, direct lending programs, and other financing programs.

- Contribute to the development of marketing plans and materials for CHEFA and CHEFA CDC's financing programs.
- Strengthen and expand external relationships with local and state funding agencies, private financial institutions, and other program partners.
- Assist in the development of direct lending funding and technical assistance goals and plans that enhance CHEFA and CHEFA CDC's programs and align with the overall strategic plan.

General Functions:

- Provide superior customer service while establishing professional rapport with the Authority's client institutions and other constituents.
- Perform other duties in support of the Authority's general operations.

Competencies

Detail oriented and strong organizational skills

Ability to work independently, prioritize and manage time to perform multiple tasks and meet established deadlines

Communication proficiency (both verbal and written)

Ability to effectively interact within Client Services and other departments

Advanced knowledge of computer software including Word and Excel

Minimum Job Requirements

B.S., Finance/Accounting or related discipline or equivalent

Experience in document review and transaction management responsibilities

In depth knowledge and experience of lending programs for nonprofits OR related experience

Alternatively, an equivalent combination of education, experience and training

Preferred Education and Experience

Master's Degree

Tax-exempt revenue bond experience in multiple sectors

Knowledge of non-profit accounting and financial concepts

Supervisory Responsibility

This position has no supervisory responsibilities.

Work Environment

This job operates in a professional office environment and a hybrid remote work environment may be available. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

Physical Demands

Prolonged periods sitting at a desk working on a computer.
Must be able to lift up to 15 pounds with or without accommodations.

Position Type/Expected Hours of Work

This is a full-time position. Monday through Friday totaling 40 hours.

Travel

Travel within the State to visit potential clients and existing clients seeking financing or technical assistance.

Additional Eligibility Qualifications

None required for this position.

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

CHEFA is an Affirmative Action/ Equal Opportunity employer.