

Portfolio Analyst – Portfolio Management Department

Reports To:

Director of Portfolio Management

Location:

Atlanta, GA

Position Overview:

This position will be responsible for assisting in the daily operations of the Portfolio/Asset Management and Investor Relations department.

Primary Responsibilities:

- Participate in coordination between Portfolio and Asset Management teams
- Manage Audited Financials/Tax Return collection process during tax season for real estate investments
- Manage collection process of Interim, Occupancy and Annual Budgets using real estate database
- Collect and aid in approval of property level tax returns and audited financial statements
- Collect and evaluate occupancy for lease up properties for analysis and discussion for portfolio management team
- Manage and collect closing and permanent insurance for real estate investments through real estate database
- Maintain Tax, Audit and Property Management company contacts in real estate database
- Work with Portfolio Management team helping maintain real estate database
- Real estate database ticket manager/liaison for bugs, issues or enhancements
- Review real estate investment summaries for correctness comparing closing pro formas, closing documentation, limited partnership agreements and due diligence
- Participate and help prepare portfolio management team for monthly meeting
- Lead special projects by keeping tasks list and deadlines and compiling any data needed

Secondary Responsibilities:

- Support Portfolio Management team by assisting day-to-day job duties including construction draw entry, identifying construction equity fundings and investor reporting
- Liaison for Underwriting and Investor Relations team assisting with data needed from real estate investments

Required Skills:

- Bachelor's degree in Accounting, Finance, or related area with a minimum of 1-2 years of accounting, real estate finance, or related work experience
- Previous work in the Low-Income Housing Tax Credit Program of Affordable Housing industry is a plus
- Excellent verbal and written communication skills
- Requires knowledge of Microsoft Office Suite, and proficiency in Excel and Word
- Excellent organizational skills with the ability to balance several projects at one time
- Detail oriented

About Sugar Creek Capital:

Sugar Creek Capital is a specialty finance firm and the national leader in state tax credit investments. Our guaranteed state tax credit funds provide corporations, insurance companies, and individuals with effective, reliable tax planning and investment opportunities. Through these state tax credit programs, our team works to bring maximum value and financial strength to housing partnerships that benefit working families, fixed-income seniors, and veterans. We work closely with corporate tax and investment departments, CPA and wealth management firms, developers, and federal syndicators across the country to structure valuable transactions while navigating complex state tax law and regulatory requirements. Since 2004, we have closed over \$1 Billion in Tax Credits across the country. With decades of experience in the development, syndication, construction and management of diverse residential properties, we bring expertise and financial strength to our partners.