

Job Description:

Portfolio Manager

About the role (to name a few key accountabilities): Under the direction of the Chief Credit Officer, the Portfolio Manager will be responsible for:

- Management of the loan portfolio of existing relationships for the Bank, and routinely monitors the loan portfolio to identify potential weaknesses that could adversely impact the overall asset quality.
- Underwrites new loans and/or renewals, increases to existing loans as needed.
- Performs annual reviews of existing loan relationships.
- Interact with clients to update status of the borrower's business plans and strategies and to build and enhance the overall client relationship.
- Provides support to the manager of the department, e.g., continuous credit improvement initiatives, and takes the lead on projects that support loan growth and efficiency objectives within lines of business.
- Assists in the preparation of Credit Administration reports.

About You:

- Minimum of a bachelor's degree in finance, accounting, credit-related field, and at least 4 years of increasingly diverse or complex applications in finance. Experience in a commercial environment is strongly preferred.
- Demonstrated experience in asset allocation and loan portfolio management with a deep understanding of regulatory reporting.
- Established credit, industrial, and risk acumen.
- Understand and interpret complex business and regulatory requirements.
- Working across all levels of the organization to understand cross-functional linkages and interdependencies, as well as the implications of risk and regulations at the business level.
- Demonstrated ability to assess credit and industrial trends, both internally and externally.
- Strong communications skills, including the capacity to articulate the case for sound credit practices in the language of business.
- Competent skill set with use of Microsoft Word with extensive Excel skills.
- Knowledge of the Fiserv platform.
- Use of the Salesforce/nCino platform.



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