



JOB DESCRIPTION FOR FINANCIAL ANALYST

Reports to:	Dir of Finance
Supervises:	None
Compensation:	Exempt/Salary. This position is not eligible for overtime. Bonuses are eligible at the discretion of the company.

QUALIFICATIONS:

- 1. Education** A bachelor's degree in accounting or finance is highly preferred. The position does require the ability to read and write English fluently, and the ability to perform advanced business mathematical functions.
- 2. Experience** Knowledge of general finance practices required, including data analysis, financing, forecasting and projections and investor returns. Prior experience in the real estate industry is highly preferred.
- 3. Technology** Advanced use of Microsoft Excel is required (including use of pivot tables, vlook up formulas, sumif formulas, charts, graphs and other advanced Excel functionality). Proficient use of other Microsoft tools such as Microsoft Word and Outlook is also required. Familiarity with MRI Software, or a comparable property management software package, is beneficial.
- 4. Skills** The ideal candidate will already possess these skills:
 - Analytical skills and complex problem-solving abilities. Exceptional at maintaining accuracy while running complex models and data analysis, in all aspects of the real estate market including acquisitions, development, property management, financing and asset management functions
 - Strong organizational skills, the ability to multi-task, manage time, and prioritize workload
 - Strong written and oral communication skills for communication internally and externally. The ability to communicate in a team environment, clearly and concisely
 - Ability to effectively work under pressure, while maintaining rational decision making
 - Ability to thrive in an entrepreneurial environment and be energized by intense timelines and changing priorities. Must be a self-starter, have the ability to work independently, think proactively and strategically.
- 5. Attendance** The position requires the ability to work Monday through Friday, 52 weeks of

the year. The position also requires the flexibility to work beyond 40 scheduled hours per week to meet deadlines as required by management.

6. **Licenses** A valid driver's license and current automobile insurance is required.
7. **Equipment** The position requires individuals to have access to a vehicle for general business reasons. Individuals must have the ability to drive without jeopardizing the safety of prospects, residents or fellow employees.

ESSENTIAL JOB FUNCTIONS:

Provide financial analysis for the acquisition, development, financing and management of the company's \$340 million real estate portfolio. Specifically:

1. Prepare financial analysis and modelling to allow for strategic decision-making as it relates to all facets of real estate including acquisitions, developments, financing, property management and asset management.
2. Collaborate with the development team to provide financial analysis for new developments, including projected financing, incentives, capital stack and investor returns. Complete tasks necessary to apply for incentives, analyze financing opportunities, pursue investor capital, and any other tasks necessary to prepare the development for construction.
3. Analyze the real estate debt portfolio to identify opportunities to enhance cash flow or leverage position. Maintain knowledge of macro and micro economic events, capitalizing on positive shifts in the market
4. Prepare and submit timely, financial covenant reports, as required by lenders
5. Analyze portfolio-wide financial reports to track actual results against plan; identify areas of improvement
6. Prepare investor reports, including financial snapshots and qualitative summaries
7. Collaborate with people inside and outside the Gillespie Group including; Lenders, legal teams, accounting firms, operating partners, development teams, investment teams, etc.

FAIR HOUSING ACT ("FHA") / ANTI-DISCRIMINATORY LAWS & ORDINANCES:

Under the FHA, state laws and many local ordinances, no individual shall be subjected to discrimination because of race, color, gender, religion, sex, handicap, mental or physical ability, age, sexual preference, familial status or national origin in the sale, rental or advertising of dwellings, in the provision of brokerage services, or in the availability of residential real estate-related transactions. Said another way, fair housing is the right of individuals to obtain housing of their choice without discrimination based upon the above mentioned categories. The Gillespie Group expects each of its Associates to fully grasp and understand these anti-discriminatory policies and to adhere to these laws and ordinances in situations that are certain to occur in the ordinary course of business that the Gillespie Group provides to its clients. To that end, the Gillespie Group requires each Associate to periodically complete training courses on fair housing, landlord/tenant law and housing subsidy programs. Such training shall be paid for by the Gillespie Group and the Associate shall be compensated for the time either attending such training in person or via online courses.

Initial _____

THIS JOB DESCRIPTION MAY NOT BE ALL-INCLUSIVE AND EMPLOYEES ARE EXPECTED TO PERFORM ALL OTHER DUTIES AS ASSIGNED AND DIRECTED BY MANAGEMENT. JOB DESCRIPTION AND DUTIES MAY BE MODIFIED WHEN DEEMED APPROPRIATE BY MANAGEMENT.

SIGNATURES:

Employee Name: _____ Date: _____

Supervisor Name: _____ Date: _____

Job Descriptions are intended to present an illustrative description of the range of duties, the scope of responsibility and the required level of knowledge, skills and abilities necessary to describe the primary functions of the job; they are not intended to reflect all duties performed by those assigned to this classification.

Initial _____