

The Sterling Group
POSITION DESCRIPTION

TITLE: Financial Analyst – Investments

DEPARTMENT: Investments/Asset Management

REPORTS TO: Vice President – Investments

STATUS: Exempt

LOCATION: 3900 Edison Lakes Parkway, Suite 200, Mishawaka, IN 46545

PURPOSE: Create capacity to support Sterling's business plan in the areas of Acquisitions, Development, Asset Management and strategic corporate activities, with a focus on Acquisitions.

QUALIFICATIONS:

EDUCATION: Bachelor's degree in real estate, finance or accounting. Advanced degree and/or licensing preferred.

EXPERIENCE: Minimum 1 year of real estate analysis experience and general understanding of real estate principals including real estate investment modeling, financial concepts, market data collection and other activities. Additional experience could warrant a Senior Financial Analyst position.

SPECIAL SKILLS: Must possess strong analytical skills, strong oral and written communication skills, be a team player, and have a strong work ethic; ability to manage multiple tasks effectively and work in a fast-paced environment; possess competencies to communicate complex financing structures and modeling to investors and lenders; possess strong analytical abilities and be proficient in Excel and Word.

RESPONSIBILITIES:

1. Assist Investments team in the screening and underwriting of potential multifamily and self-storage acquisitions for the company based on internally published criteria.
2. Assist Investments team with the evaluation of outside financial data, along with providing updates to cash flow models for potential acquisitions.
3. Gather and evaluate economic, demographic, and real estate market data for generating reports on a regular basis for acquisition, development, and management activities.
4. Stay abreast of industry trends, particularly how it relates to capital markets.
5. Assist in market study review and prepare recommendation prior to acquisition, pertaining to rent-income levels and related activity such as concessions, incentives, vacancy, and other income.
6. Assist in the preparation of presentations, memoranda, and financial reports to Investment Committee and lenders.
7. Assist in on-site due diligence.

8. Assist in capital raising efforts.
9. Assist Investments and Transactions teams in the review and analysis of legal documents and other materials throughout the due diligence and closing processes.
10. Work with Vice President of Asset Management and key Management colleagues to prepare and update initial year budget projections and multi-year business plans.
11. Assist Asset Management with financial analysis support, including but not limited to:
 - a. Review all property activity; income, expense, weekly Monthly Marketing Report (MMR).
 - b. Track the risk criteria for each asset and point out potential problems. Verify and track all property information (including legal entities).
 - c. Responsible for the property valuation and review of financial projections.
 - d. Assist in the review and analysis of monthly property operating statements (MOR).
 - e. Review key loan documents and partnership agreements, assist in preparing asset reports on the behalf of the Asset Management Department and enjoy interaction with the Management Company and Investment partners.
 - f. Perform basic property analysis including variance review, market analysis, and lease activity evaluations.
 - g. Prepare recovery models for those assets behind proforma and budget expectations.
 - h. Preparing detailed spreadsheets for the preparation and analyses of asset operations and dispositions.
12. Assist VP of Development in new market data collection and review, providing comprehensive reports prior to development, pertaining to rent-income levels and related activity such as concessions, incentives, vacancy and other income in respective markets.
13. Support Sterling's development activities in the areas of financial modeling and analysis.
14. Perform all other tasks as assigned.

LICENSES/CERTIFICATIONS: None required

TRAVEL: Periodic

COMPENSATION: Salary, Bonus and Competitive Benefits consistent with market conditions.

**HOURS: Monday-Friday 8:00 a.m. to 5:00 P.M.
Due to the transactional nature of our business, additional hours may be required.**

_____ Date	Submitted by: _____ Vice President - Investments
_____ Date	Approved by: _____ President/C.O.O.