



## **Job Description**

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### **About Intend Indiana**

Intend Indiana is a not-for-profit organization that envisions communities where quality of life, access to housing, and economic opportunities are not determined by race, socioeconomic background, or zip code. Intend advances comprehensive community development through innovative financing and development solutions that create and preserve affordable housing, support neighborhood revitalization efforts, and foster small business development.

Diversity, Equity, and Inclusion are the foundations on which Intend is built. We are committed to intentionally integrating our core values of accountability, collaboration, empathy, equity, and innovation through our organizational culture as we define and implement internal and external strategic priorities. We will hold ourselves accountable by publicly sharing established metrics, maintaining a diverse and inclusive board and staff, and collaborating in meaningful partnerships. Intend is committed to supporting diverse professionals who reflect on the communities we serve and further their career in real estate and community development.

Not sure if you meet all the requirements listed below? Please apply anyway! Intend Indiana is dedicated to building an inclusive, diverse, and equitable workplace that fosters a sense of belonging – so if you're excited about this role but your past experience doesn't align perfectly with every qualification in the job description, we encourage you to still consider applying. You may be just the right candidate for this role or another one of our openings!

<b>Title</b>	<b>Build Fund Loan Portfolio Manager</b>	<b>Exempt</b>
<b>Reports to</b>	<b>Director of Build Fund</b>	<b>Date last revised: April 2026</b>
<b>Supervises</b>	<b>N/A</b>	

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### **Position Summary**

The Build Fund Loan Portfolio Manager is a key operational role responsible for managing and executing loan transactions and overseeing the performance and ongoing health of Build Fund's loan portfolio. This position plays a central role in ensuring loans are processed, underwritten, documented, closed, and serviced accurately, efficiently, and in alignment with Build Fund's lending strategy, risk parameters, and impact goals.

The Loan Portfolio Manager serves as a primary point of accountability for portfolio monitoring, loan servicing coordination, data integrity, and reporting, and works closely with internal teams, contracted underwriters, accounting, and leadership to support compliance, transparency, and informed decision-making. Through strong execution and attention to detail, this role helps ensure the long-term performance of the portfolio while advancing Build Fund's mission to support equitable community development and access to capital.

### **Evaluation of Performance**

Performance will be evaluated based on meeting the specific goals, deadlines, and other quality indicators established for this position; working according to all specifications, policies, and standards established by Intend, working effectively in a team environment, and interacting positively with all clients and employees.



## **Essential Responsibilities**

### **Loan Origination, Underwriting, and Closing**

- Manage loans from application through underwriting, documentation, and closing
- Coordinate with contracted underwriters, complete internal underwriting of specified loan types, and review credit analysis
- Prepare and review loan documents
- Serve as primary borrower contact from application through closing
- Prepare and present credit memos, loan recommendations, and portfolio reports to leadership, loan committees, funders, and the Board
- Collaborate with accounting to ensure accuracy of financial data, amortization schedules, and reporting

### **Portfolio Management, Risk and Reporting**

- Manage loan servicing and monitoring
- Conduct risk assessment and portfolio analysis
- Track portfolio performance, concentration, and compliance
- Support reporting to leadership, funders, and Board
- Coordinate with accounting and internal teams
- Maintain accurate loan and portfolio data
- Responsible for managing loan performance, risk monitoring, and portfolio reporting in alignment with Build Fund's lending strategy and impact goals
- Performs other duties as assigned to support team and organizational objectives

## **Key Outcomes**

- Efficient, accurate, and timely loan processing and underwriting.
- High-quality credit decisions supported by clear analysis and recommendations.
- Strong pipeline of qualified borrowers aligned with portfolio and impact goals.
- Well-managed portfolio with appropriate risk ratings and collateral coverage.
- Accurate and reliable financial and portfolio reporting for stakeholders.
- Full compliance with regulatory standards and internal policies.
- Increased community engagement, partnerships, and program visibility

## **Critical skills, knowledge and behaviors**

- Embrace and demonstrate the organizational values of transparency, integrity, empathy, inclusion, and innovation both internally and externally.
- Provide courteous, professional services to clients and present a positive image of Intend Indiana.
- Attend training on applicable subjects when available and appropriate.
- Participate in Intend Indiana's professional development opportunities and training programs as required and apply new learnings.
- Attention to detail and accuracy along with strong organizational skills



## **Experience, education, degrees and licenses**

### **Minimum Qualifications:**

- Bachelor's degree in finance, accounting, or a related field (or equivalent experience)

**OR**

- Minimum 2 years of experience in lending, loan operations, credit administration (preferably with a Community Development Financial Institutions - CDFI/nonprofit lender) or a related field.
- Experience with loan reporting, data management, and compliance.
- Experience in business lending and business development.
- Strong analytical skills with the ability to manage multiple priorities and meet deadlines.
- Excellent communication, relationship-building, and customer service skills.
- Highly organized with strong attention to detail and file quality standards.
- Ability to work both independently and collaboratively.
- Proficiency in Microsoft Office (Word, Excel, PowerPoint).
- Ability to travel within Indiana and work occasional evenings and weekends.

### **Desired Qualifications:**

- Experience working with underserved communities.
- Familiarity with CDFI lending practices.
- Bilingual (Spanish/English) preferred.
- Relevant experience in commercial lending, underwriting, banking, or CDFI/community development finance.

### **Physical Demands**

Must be able to work proficiently with computers and other office equipment.

Work is primarily in an office environment, both at the Intend Indiana office and stakeholder offices.

Must be able to travel to meet potential lenders, City/State leadership, etc. Travel will be throughout the state of Indiana.

### **Americans with Disabilities Act**

Applicants as well as employees who are or become disabled must be able to perform the essential duties and responsibilities either unaided or with reasonable accommodation. The organization shall determine reasonable accommodation on a case-by-case basis in accordance with applicable law.

### **Equal Employment Opportunity**

Intend Indiana Indianapolis provides equal employment opportunities to all qualified individuals without regard to race, creed, color, religion, national origin, age, sex, marital status, sexual orientation, or non-disqualifying physical or mental disability in accordance with all federal, state, and local regulations.

### **Job Responsibilities**

The above statements reflect the general duties, responsibilities and competencies considered necessary to perform the essential duties and responsibilities of the job and should not be considered as a detailed description of all the work requirements of the position. Intend Indiana may change the specific job duties



with or without prior notice based on the needs of the organization.

**Position requirements:**

- Must be available for occasional evening and weekend meetings or events.
- Must have a valid driver's license.



**ACKNOWLEDGEMENTS**

**Supervisor: I reviewed this job description with my employee.**

Signature:

Date:

**Employee: I have reviewed this job description with my supervisor and acknowledge receipt.**

Signature:

Date: