



Job title	Investment Analyst
Reports to	Senior Investment Analyst

Job purpose

The Investment Analyst will be responsible for performing various aspects of underwriting and due diligence for real estate transactions. Uses acquired knowledge and independent judgment to determine eligibility of investments and risks when compared to investment strategy.

Duties and responsibilities

Position Expectations and Outcomes for Year 1

Months 1-3 (learning, basic analytical and marketing support)

- Transpose provided occupancy statistics reports and operating statements into underwriting model.
- Conduct market research using company tools and other programs for feasibility analysis as needed.
- Compile and package collateral material (maps, aerials, photos).
- Complete FEMA Flood searches and property tax searches for acquisition opportunities.
- Learn to review purchase agreements, closing statements, appraisals, tax forms, surveys, lease agreements, and title documentation.

Months 3-9 (continued learning, moving into underwriting)

- Provides loan closing coordination including collecting due diligence items, ordering third party reports, coordinating with all parties including borrowers, lenders and legal counsels, and acting as liaison with the servicing department.
- Participate in the creation of Debt and Equity Decks.
- Gather and compile utility bills for property acquisitions.
- Performs full underwriting analysis under the guidance of superiors.

Months 9-12 (learning, intermediate underwriting and closing)

- Assist in preparing the underwriting of commercial real estate properties based on historical financial statements, projections, and market standards to determine a projected income, value and loan amount.
- Models in-place and prospective portfolio performance including investor returns (promotes, waterfalls, and catchups).
- Responsible for assisting in the coordination of all portfolio insurance requirements.
- Prepares investment reports in compliance with company guidelines and investor requirements. These reports include analysis of the borrower, property, underwriting, valuation, location, market, leases/rent roll, photographs, aerials, maps, etc.
- Assist with drafting investment memos to be presented to lenders and investment committees.
- Assists in Property Tax Appeals on a national basis.
- Assists with financing and disposition transactions.
- Assists with ad-hoc/special projects as needed.

Qualifications

- Bachelor's degree, preferably with a major in Real Estate, Finance, or Business Administration.

- Strong computer knowledge and skills including in-depth expert knowledge of Microsoft Office (Excel, Word, & PowerPoint) & the ability to learn new applications.
- Ability to prioritize and to multi-task in a fast-paced environment.
- Ability to handle confidential information in a discreet, professional manner.
- Eye for detail, accuracy is imperative.
- Able to meet deadlines.
- Excellent oral and written communication skills.
- Excellent organizational and analytical skills.
- Ability to be an effective team member and display initiative.
- Ability to work independently and collaboratively.

Language Skills:

- Ability to use tact and diplomacy to maintain harmonious relationships with business contacts in person and over the phone.
- Excellent verbal and written communication skills.

Working conditions

The job requires a person to work long hours, including nights and weekends.

Physical requirements

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of their job.

- Ability to sit/stand for extended periods of time. Manual hand dexterity required to operate POS, copiers and complete paperwork.

Direct reports

None

This job description may be changed to include new responsibilities and tasks or change existing ones as management deems necessary.

Contact:

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