

July 2018

Job Title: Portfolio Manager – Private Bank
Department: Credit Administration
Location: Pittsburgh, PA

Job Summary:

The Private Bank Portfolio Manager assists the Relationship Managers with the underwriting of credit and the ongoing administration of loans, providing more time for the Relationship Managers to generate new business opportunities. Ensuring that the Bank maintains high credit quality standards, the Portfolio Manager performs an objective evaluation of client credit availability pertaining to marketable securities and other types of liquid asset collateral, then summarizes and communicates their findings accordingly.

Primary Job Responsibilities:

- In a high volume environment, evaluates/validates defined eligible collateral, advance formulas, supporting collateral information and personal financial statements submitted by clients.
- Reviews brokerage statements and system feeds in order to value collateral assets associated with Private Bank lines of credit.
- Identifies determinations or issues regarding loan approvals, declinations, defaults, or supporting financial documents. Summarizes and communicates findings to internal business partners, such as Relationship Managers, Loan Operations representatives and members of the Bank's Legal Department.
- Ensures that line of credit availability is accurately reflected on the Bank's loan approval documents.
- When required, reviews legal and borrower provided documentation for accuracy and completeness.
- May assist in the analysis of problem accounts and propose acceptable solutions regarding customer service issues.
- Performs related reporting and project support work.

Essential Skills and Abilities:

- Demonstrated knowledge of accounting principles and reconciliation procedures.
- Proficient in MS Office, specifically Excel and Word.
- Highly organized with strong attention to detail.
- Professional interpersonal and communication skills.
- Exemplary writing, critical-thinking, and analytical skills.

Education and Experience Requirements:

- Bachelor's Degree, preferably in Business or related field, is required.
- A minimum of 3 years of related experience is required.
- Financial services experience with exposure to marketable securities, collateralized or asset based lending, or loan administration is preferred.

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