



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

Job Summary:

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

Primary Job Responsibilities:

- Evaluates/validates defined eligible collateral, advance formulas, supporting collateral information and personal financial statement when 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 and communicates findings to internal business partners, such as Relationship Managers and Loan Operations representatives.
- 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.
- Organized with strong attention to detail.
- Professional interpersonal and communication skills.
- Strong writing, critical-thinking, and analytical skills.

Education and Experience Requirements:

- Bachelor's Degree, preferably in Business or related field, is required.
- A minimum of up to 1 year of credit analysis and underwriting 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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