



**Job Title:** Portfolio Manager C&I  
**Department:** Credit C&I  
**Location:** Pittsburgh, PA

**Summary of the Position:**

The Commercial and Industrial (C&I) Portfolio Manager assists the relationship managers with the underwriting of credit and the ongoing administration of loan portfolios to ensure that the Bank maintains high credit quality and to provide more time for the relationship managers to generate new business opportunities.

**Primary Functions of the Position:**

- Underwrites requests for credit extensions to new and existing clients
- Performs detailed financial analysis primarily for Commercial & Industrial lending opportunities
- Prepares the following for presentation to Senior Loan Committee by the relationship managers:
  - Credit Approval Requests (CAR)
  - Modifications
  - Covenant Waivers / Amendments
  - Periodic Reviews
- Manages / monitors assigned portfolio for:
  - Borrower Credit Trend
  - Accurate and Timely Risk Rating
  - Required Financial Reporting
  - Covenant Compliance
  - Borrowing Base Availability
  - Payment Delinquencies
  - Overdrafts
- Ensures compliance with the Bank's credit policies and procedures, identifying exceptions for approval when they occur
- Ensures the initial set-up of credit facilities on Baker Hill and other internal systems is consistent with the reporting requirements contained in the loan documents
- Prepares periodic financial reviews where required
- Ensures the timely spreading of interim and annual financial statements provided by clients
- Accompanies the relationship manager on prospect / client calls when appropriate

**Education and Experience Requirements:**

- Bachelor's Degree in Accounting, Finance, or related field; MBA preferred
- Minimum 5 years of credit analysis and underwriting experience
- Completion of bank commercial credit training program

**Essential Skills and Abilities:**

- Demonstrated knowledge of accounting theory and its practical application in the credit underwriting process
- Strong analytical skills including the ability to read and assess individual and company financial statements, cash flow, industry, competition and projections
- Excellent organizational skills, attention to detail, and the ability to work in a fast-paced environment and complete assignments in a timely manner with minimal direction
- Strong written and verbal communication skills
- Strong presentation skills
- Ability to work independently and within a team
- Proficient in various spreadsheet applications, including the use of graphs, charts and Moody's financial analysis software



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