



### **Job Description – Senior Associate, Investments (Multifamily)**

White Oak Partners is a growing multifamily real estate investment firm with over \$2.4B AUM. We are looking for a **Senior Associate** to join our growing Investments team. This position will report to the VP of Investments and work with the Acquisitions and Investments team to identify and analyze multifamily real estate investment opportunities throughout the U.S. In this role the senior associate will gather and analyze financial data to build models, perform variance analysis, provide investment summaries to the investment committee and mentor junior associates. The primary job functions involve, but are not limited to:

#### **Essential Duties:**

- Work with the VP of Investments to coordinate and run due diligence on deals
- Create and maintain relationships with lenders while sourcing debt for deals
- Present underwriting during investment committee meetings and to investors
- Ad-Hoc analysis and reporting
- Build financial models, cost analysis, pro-forma and discounted cash flow models, and investor waterfall structures
- Direct preliminary investigation on market conditions for new opportunities with the research team
- Mentor and guide the workflow of the junior associates on the team
- Travel will be required for due diligence tours and from time to time will assist acquisitions in the sourcing and evaluation of deals

#### **Minimum Requirements**

The ideal candidate for this position will thrive in a highly entrepreneurial, collaborative, and fast moving environment. This self-starter candidate should be an enthusiastic team player, offer innovative ideas and have the ability manage multiple priorities.

- Advanced knowledge of Excel
- Strong real estate background with familiarity of White Oak's target markets
- Aptitude for visually evaluating physical deferred maintenance and issues at multi-family properties
- Ability to lead and manage property due diligence
- BS/ BA degree with strong academic and finance background.
- 2-4 years real estate industry financial analysis experience, knowledge of multifamily strongly preferred
- Conceptual knowledge of core business disciplines including real estate finance, investment principles, corporate finance, and accounting
- Advanced knowledge of underwriting for various investment strategies that includes, but not limited to the following: value-add, core-plus, core, new developments, etc.
- Strong problem-solving, analytical and quantitative skills
- Good oral and written communication skills, operate effectively in a collaborative environment, and able to express ideas and describe information in a clear and concise manner

*Note: Nothing in this job description restricts the right for management to assign or reassign duties and responsibilities to this job at any time.*

- Ability to train and mentor staff
- Professional presence to interact with executive management
- Ability to balance multiple projects simultaneously with demanding deadlines in a small team environment
- Travel will be required approximately 20% of the time