



**Contact: Sarah Weatherbee at [sarah@kelleraugusta.com](mailto:sarah@kelleraugusta.com) or 617.247.0505**

**Job Title :** Portfolio Financial Manager

**Area of Interest :** Asset Management

**Location :** Boston, MA

**Description:** Our client is an equity real estate investment trust specializing in the ownership, management, development, and redevelopment of high quality retail assets. The portfolio (excluding joint venture properties) contains approximately 19.5 million square feet located primarily in strategic metropolitan markets in the Northeast, Mid-Atlantic, and California. In addition, the firm has an ownership interest in approximately 1.0 million square feet of retail space through joint ventures.

**Responsibilities:** Responsible for all financial aspects (including analysis and reporting) on portfolios totaling approximately 25% of our client's managed properties located on the East Coast. The Portfolio Financial Manager will act as the "CFO" for their assigned portfolio.

- Create, maintain, and analyze detailed 10-quarter rolling cash flow forecasts for each property and consolidated for the portfolio
- Perform budgeting and forecast variance reporting on a quarterly, and annual basis
- Create monthly, quarterly, and annual reporting for properties within the joint venture and third-party management
- Ensure accurate reporting of portfolio financials including monthly accruals
- Minimize portfolio bad debt through active management of watch list tenants and interaction with the firm's collections department
- Oversee tenant billings through indirect oversight of assigned lease administration personnel.
- Make leasing recommendations following lease analysis of proposed lease economics and tenant creditworthiness.
- Manage real estate tax expenses through tracking of assessments, review of bills, and interaction with tax counsel on potential appeals.

**Qualifications:**

- Motivated, self-starter with the ability to work with minimal supervision and to function in a team environment effectively communicating and sharing information with people in other departments within the company.
- Excellent financial analysis skills including thorough knowledge of MS Excel
- Excellent interpersonal, verbal and written communication skills.
- Highly organized and efficient with the ability to handle multiple projects, think creatively and set priorities.
- Proficiency in Dyna and CTI preferred
- Proficient in MS Word
- Minimum 5 years financial experience with commercial real estate owner (ideally retail), manager, or real estate consulting group
- Bachelors degree (finance, accounting, or real estate concentration preferred)