



## **JOB DESCRIPTION | PORTFOLIO ANALYST**

**Department/Group:** Operations  
**Location:** Virginia Beach, VA  
**Reports To:** COO

### **JOB DESCRIPTION:**

- Review, and revise various types of transactional agreements about real estate management and leasing. Documents including but not limited to leases; commercial retail leases; license agreements; estoppel certificates; SNDA's; settlement agreements; lease guarantees; lease commencement agreements; telecommunications agreements and other real estate related transaction documents
- Develop strategies to achieve property and portfolio return objectives
- Assemble portfolio data including acquisition details, debt, and equity structures
- Lead and manage the budget and forecasting process from start to finish, including the establishment of budgeting procedures to ensure prompt, complete, and accurate projections to be used by the executive team for cash and earnings reports
- Responsible for management and production of Operational Reports and presentation materials for both internal and external partners
- Assist in the assessment and review of monthly financials and review of lender reporting schedules
- Actively work with the internal capital markets team and external loan brokers to obtain and track all property level financing to achieve property and portfolio return objectives
- Assist dispositions team including participating in broker interviews, contract negotiation, due diligence, transaction management, and closing
- Maintain and update ARGUS models for the existing portfolio and create new models to analyze investment opportunities

### **EXPERIENCE, REQUIREMENTS AND CORE COMPETENCIES:**

- Advanced level of proficiency in Excel, Word, Outlook, and MRI or similar
- Related job experience should showcase financial analysis capability
- Experience with revenue management software, including MRI CM, GL, CAM, and Budgeting and Forecasting Modules
- Proficient in ARGUS and Excel
- Strong written and verbal communication skills with the ability to manage internal and external relations and JV partnerships
- Experience with position of assets and property disposition, not just core/stabilized assets
- Solid analytical/logical mindset and attention to detail
- Self-motivated with ability to work both autonomously and with team
- Demonstrates best practices in terms of reports and procedures and can help develop efficiencies in operations and oversight
- Ability to handle a fast paced, deadline driven environment
- Ability to multi-task and prioritize assignments while delivering consistent, quality work product to property managers, brokers, attorneys, and clients
- High level of attention to detail and accuracy
- Ability to work with little supervision and to seek guidance when needed
- Ability to build and maintain strong internal and external relationships
- Ability to think independently while working within a group
- 

### **QUALIFICATIONS AND EDUCATION REQUIREMENTS:**

- Must have minimum five years' commercial real estate experience

**WORK ENVIRONMENT AND PHYSICAL DEMANDS:**

This job operates in a professional office environment. This role routinely uses standard office. While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; sit throughout the day.

Please note, this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

Benefits include: a flexible work week, summer hours, casual Friday, rich health care plans, 401K with company match, company paid life/short- and long-term disability, tuition reimbursement, and a great atmosphere!

Please send all resumes, cover letters, and salary requirements to Dana Sherman, Director of Human Resources, [dsherman@whlr.us](mailto:dsherman@whlr.us).