



The Indy Chamber's mission is to drive economic growth in Central Indiana by bringing job and investment opportunities to the region, advocating for a pro-growth business climate, and connecting businesses to resources and each other.

Greater Indianapolis Chamber of Commerce		Job Expectations
Title	Assistant Portfolio Manager	Non-Exempt
Reports to	Director of Central Indiana Women's Business Center	Date last revised: 10.28.2021
Supervises	None	
Summary	The CIWBC Assistant Portfolio Manager is a qualified business coach and strategist helping clients with business sustainability and growth. This individual will assist with lending operational tasks such as payment processing, loan document preparation and other loan portfolio operations.	
Evaluation of performance	Performance will be evaluated based on meeting the requirements of the job description; meeting specific goals and performance metrics for the position; working according to all policies and standards set by the Chamber; and consistently demonstrating established Chamber values.	
Performance metrics	Performance metrics for this position will be established annually based on accomplishing key deliverables related to the job description and developed with the employee.	
Key outcomes expected	<ul style="list-style-type: none"> • Provide one-on-one technical assistance to small business clients, focused on: <ul style="list-style-type: none"> ○ Cash flow management and financial forecasting ○ Lending ○ Business strategies for start-up, market research, marketing and sales, human resources, accounting, XBE certification and government contracting, strategic planning • Guide clients through the BOI loan application process and prepare loan package • Maintain detailed records of client meetings and business progress • Assists with the closing and proper documentation of the BOI loans including the creation of the loan closing documents • Enter the loan details in portfolio management software and SBA MPERs data entry • Support loan portfolio management activities, including monitoring of loans and collection efforts on loan portfolio including scheduling the monthly loan payments, preparing monthly statements to clients, accurately reporting payments received and reporting transactions • Maintain BOI loan file integrity • Other lending support functions as assigned 	
Critical skills, knowledge, and behaviors	<ul style="list-style-type: none"> • Effective written, verbal, presentation and listening communication skills. • Ability to work in highly collaborative environment. • Organized, detail-oriented and efficient with a demonstrated ability to meet deadlines with high level of accuracy. • Ability to be a self-starter and able to work with a diverse group of entrepreneurial clients • Understanding of the credit underwriting process of small business lending • Ability to write reports, business correspondence, and procedure manuals. 	



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	<ul style="list-style-type: none"> • Three years related work experience; preferably bank, CDFI, or other lending institution. • Demonstrated interest in community economic development and the mission, vision and values of Business Ownership Initiative.
Experience, education, degrees, licenses	Bachelor’s degree or equivalent and 3 years previous experience with comparable responsibilities.
Physical demands	Must be able to work proficiently with computers and other office equipment.
Work environment	<p>Work is performed in an office environment.</p> <p>Daily work is generally performed in an office environment either at the Chamber or at a member location.</p> <p>Work is often conducted before, during, and after traditional business hours (i.e. 8-5).</p> <p>Events are generally held at either a public location, e.g. Convention Center, Union Station, Indiana Roof, etc., or a member’s facilities; these events may be before, during, and after traditional business hours (i.e. 8-5).</p>