Downloaded from <https://www.velvetjobs.com/job-descriptions/corporate-banking-portfolio-manager>

# Example of Corporate Banking Portfolio Manager Job Description

Our company is growing rapidly and is searching for experienced candidates for the position of corporate banking portfolio manager. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for corporate banking portfolio manager

* Loan Maintenance – Identify changes in risk factors and complete downgrade / upgrade requests as these factors decline / improve
* Business Development/Call Prep – Assist RM in targeted client identification
* Qualification/Proposal – Work with client to gather financial information to begin the diligence process
* Credit/Credit Approval – Spearhead the request through the credit process and serve as the primary contact when appropriate
* Documentation – Work with attorneys and clients for preparation, negotiation and execution of loan documentation
* Identify, pursue and close sales opportunities for a broad range of financial products and services, including corporate finance opportunities
* Initiate and maintain strategic dialogue with key clients and prospects compliance, BSA/AML teams and other key personnel to effectively manage the ongoing coverage KYC aspects · Collaborate with credit underwriting team on analysis, structuring, negotiation, and documentation of credit requests
* Underwriting various types of credit account exposure for securities industry and/or investment management clients
* Managing an assigned credit portfolio
* Managing credit risk and responding to prospect or customer credit questions

## Qualifications for corporate banking portfolio manager

* Ability to work with Information Technology (IT) for design and development of counterparty risk management infrastructures
* At a minimum MS Access and MS Excel intermediate user
* Bachelors Degree required (Mathematics, Computer Science preferably)
* Entry level to 4 years of professional experience
* Very good written/verbal communication
* Good knowledge of Microsoft office suite, particularly PowerPoint Excel and Word