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

# Example of Credit Portfolio Manager Job Description

Our innovative and growing company is hiring for a credit portfolio manager. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for credit portfolio manager

* Communicate with existing customers through relationship managers for ongoing credit review and maintenance of current portfolio
* Monitor existing portfolio for past dues, expired loans and other exceptions
* Attend and participate in loan approval discussions
* As a credit officer, review and deliver credit decisions on a specified aggregate exposure of new loan requests and renewals
* Ensure each loan and total portfolio is accurately risk rated in order to assess overall credit risk
* Identify problem loan situations and deterioration of credit quality within the portfolio and communicate findings to management in a timely manner
* Prepare and present special projects, reports and assignments as requested
* Provide high quality customer service assist business banking officers in cultivating new relationships
* Ensure complete and accurate compliance with legislation and regulations
* Identify cross-sell opportunities and recommend products

## Qualifications for credit portfolio manager

* The Client Portfolio Manager’s role is to know the portfolios they represent as if they were the Alpha Portfolio Manager
* Degree, preferably in Finance, Economics or related subjects
* CFA level 2 or equivalent preferred
* Demonstrated track record in operating in large and complex organisations and across regional borders
* Developed interpersonal, presentation skills and ability to deal with clients and colleagues at all levels
* Ability to act as a fiduciary, with strong work ethic and positive attitude