



Example of Credit Portfolio Manager Job Description

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Our company is looking to fill the role of credit 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 credit portfolio manager

- Implement investment insights by interacting with sell-side firms while negotiating individual asset execution in a manner consistent with investment rationale, market structure and best execution
- Raise and book orders in a manner consistent with firm best practices
- Oversee portfolio construction to ensure compliance with risk limits and consistency of investment rationale
- Develop detailed understanding of and monitor portfolio compliance and risk infrastructure
- Manages all aspects of existing CRE portfolio including but not limited to escrow and collateral releases, assumptions, re-tax and servicing issues
- Prepares responses to examiners, internal and external auditors, ensuring appropriate remedial actions are taken, as needed
- Responsible for Enterprise Risk Management and regulatory compliance, including HMDA, BSA, Ensures adherence with internal and legal guidelines
- Represents the CRE Group in dealings with the Internal Audit and Compliance for audit and compliance issues
- Partners with Senior Management to influence key decisions and collaborate to effectively implement change
- Responsibility for maintaining and enforcing the Bank's Loan Policy

Qualifications for credit portfolio manager

- Review legal documents, with appropriate partners where appropriate, to ensure terms match approval granted by credit committee and bank is properly protected
- Proven ability to design, construct and implement investment-grade credit based portfolios, both dedicated and within the context of overall broad markets portfolios and strategies
- Experience working in a team-oriented environment and skilled at identifying, communicating and implementing cross-sector valuation decisions in portfolios, Credit is cheap/rich versus other sectors
- Idea generation and implementation of relative value analysis and portfolio sector allocations are important to success in this position
- Experience in trading investment-grade credit fixed income securities