National Trust Community Investment Corporation
a subsidiary of the National Trust *for* Historic Preservation

2024 Goldman Fellow - Investment Analyst

JOB SUMMARY:
National Trust Community Investment Corporation (NTCIC) enables tax credit equity investments that support sustainable communities nationwide. NTCIC places qualified federal and state historic tax credits (HTC), new markets tax credits (NMTC), and solar tax credits (ITC). NTCIC is a wholly owned for-profit subsidiary of the National Trust for Historic Preservation.

The 2024 Goldman Fellow Investment Analyst will assist with a variety of activities related to real estate tax credit investments for National Trust Community Investment Corporation. The position will assist and support the acquisitions, project management, and asset management teams with the origination, underwriting, closing, and asset management of historic tax credit and new markets tax credit investments. These investments may include debt and equity investments in multifamily residential, commercial, and mixed-use historic rehabilitation projects throughout the United States involving historic and/or new markets tax credits.

DUTIES:
- Work with the Acquisitions, Project Management, and Asset Management teams to gain understanding of department roles and activities including how tax credit investments are identified, selected, underwritten, closed and managed.
- Help conduct market research using third-party resources (market study, appraisal, CoStar).
- Support the preparation of initial investment summaries and ongoing reporting.
- Assist with the collection and review of materials for both due diligence and ongoing requirements including insurance certificates, environmental reports, GC and architect qualification statements, guarantor and project financial information, documentation related to monthly construction draws & HTC equity installments, investor requests, and annual audits and tax returns.
- Assist with investor, customer, and project tracking utilizing Salesforce, including generating reports and ensuring that projects are being tracked accurately.
- Assist with updating internal tracking spreadsheets including documenting all loan maturity dates and available extensions, noting all placement in service dates and ensuring consistency across tax returns and other information provided by sponsors, inserting and/or updating net cash flow and tax equivalency payment calculations, and calculating and tracking unpaid lease payments.
- Assist Asset Managers with collecting and entering data for quarterly reporting.
- Assist Asset Managers with construction draw requests.
- Review project files to ensure documentation is available in applicable folders.
- Assist with duties on multiple transactions at any given time with a strong commitment towards meeting deadlines.
- Assist with special projects, as needed.

QUALIFICATIONS:
- Bachelor's degree with emphasis in real estate or finance (or equivalent work experience) and either a master's degree in business, finance or real estate (or equivalent). 1-2 years of experience preferred.
- Strong financial analysis and spreadsheet (Excel) skills required.
- Excellent verbal and written communications skills required.
- Demonstrated ability to take initiative and think independently.
- Demonstrated ability to work well independently and in a team setting.
- Ability to manage multiple projects with various deadlines.

The National Trust Community Investment Corporation is an equal opportunity organization and does not discriminate based on race, color, religion, national origin, sex, age, sexual orientation, veteran status, or disability.

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