

Opportunity Profile

Portfolio Manager - Private Debt CLO, SMA, Leveraged Loan Funds Investment Management Chicago, IL

Company Overview

Our client is the global investment management group of an international financial firm. It oversees and invests over \$260 billion in AUM.

Essential Duties and Responsibilities

The role involves two major elements and expertise: leveraged finance credit and CLO fund structuring, issuance and administration. Overall, evaluate, invest in and monitor individual middle market private equity sponsor backed leveraged loan investments and assist with fund raising, structuring and administration. This role is a member of the Portfolio Manager team overseeing a significant amount of AUM/Assets and is recognized as a top-performing portfolio manager.

Leveraged Loan Credit Analysis and Investment- Loan investments are managed within a portfolio(s) that typically takes the format of CLO's or SMA's. Analyze and invest in individual, deal by deal club participations of middle market leveraged finance transactions for companies in the \$5MM-\$50MM EBITDA range. Analyze, assess and decide the credit worthiness of individual transactions and ensure that those transactions fit within the fund vehicle parameters.

CLO / SMA Fund Issuance, Raising, Structuring, Management - Run and oversee middle market CLO / SMA issuance - review all CLO documentation, negotiate and explain deal terms and capital structure /returns with investors, negotiate and close middle market loan warehouse lines, and build relationships with CLO underwriters, investors and financing providers. Additional responsibilities revolve around initial fund capital raising and fund vehicle financing, investment management, trading recommendations, investor reporting and relationships.

This role is positioned as an excellent launching opportunity to grow professionally with new private multi-asset and international products, subsidiaries and funds of a \$260 AUM Asset Manager.

Qualifications and Knowledge

- Direct individual loan and credit analysis and lending experience.
- Experienced in fiduciary, CLO or related fund management / administration.
- Understands how CLO's work in detail.
- Experienced in the launch, onset, and issuance of CLO's or similar vehicles.
- Strongly prefer experience in effectively interfacing with investors and fund raising, rating agencies and warehouse providers.
- Strongly prefer 5+ years' experience in cash flow lending and financial statement analysis.
- Seeking demonstrated success in investment management, securities/credit analysis, trading or financial consulting.
- Master's degree in business, economics or finance and/or C.F.A. strongly preferred.
- Undergraduate degree in business, finance, mathematics, and/or economics.
- High energy with sell-side spirit is critical.

Please email resumes or referrals to Phil Coffin at phil@coffinonline.com.