



## Job Description

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**Job Title:** Asset Management Specialist  
**Department:** Asset Management  
**Reports to:** Senior Asset Manager  
**FLSA Classification:** Non-exempt  
**Supervises:** N/A  
**Created / Updated:** March 2023

### POSITION OVERVIEW

The Asset Management Specialist assists in the functions of the Asset Management Department by providing assistance with the preparation, review, and follow-up on the different reports generated by the department. Assists in the timely preparation and filing of monthly, quarterly, and annual reports to the respective regulatory agencies, investors, lenders, and others as required.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following:

- Organizing and maintaining filing systems for both hard copy and electronic filing systems of the Asset Management department.
- Compose and type routine correspondence and assist in the preparation of financial schedules and other reports as requested.
- Assists in preparation and submittal of all monthly, quarterly, and annual financial reports to regulatory agencies, investors, lenders, and others as requested.
- Assist in the review of the management company's monthly operating reports and process information to excel spreadsheets for review by Senior Asset Manager.
- Prepare Balanced Scorecard reports and maintain/monitor monthly occupancy reports.
- Prepare reporting schedule for each project to ensure compliance with regulatory agencies, partnerships agreements, and loan agreements.
- Assist in the scheduling and preparation of written responses to compliance inspections by the different investors.
- Coordinates the filing of the Limited Partnership and Limited Liability Corporation tax returns.
- Assist the Property Management company with gathering documents (contracts/MOU's) needed for the annual filing of welfare exemptions.
- Assist in the coordination of Las Palmeras HOA meetings.
- Assist in the coordination of Property Management meetings.
- Assist with building maintenance and repair requests.
- Other duties as assigned.

## **QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Education and/or Experience**

- A four-year degree in Business Administration or Accounting is desirable, or a combination of AA Degree in accounting, finance; and/or two to three (2-3) years related experience in an office setting. Affordable housing construction industry a plus.

### **Required Technical Skills**

- Working knowledge of computers, and most used business software to include, Microsoft Word, Excel, Outlook, PowerPoint, and accounting software.

### **Required Licenses/Certifications**

- Valid California Driver's license, and ability to use personal vehicle to travel within CVHC service area. Proof of auto insurance.

### **Other Skills and Abilities**

- Excellent written and verbal communication required.
- Be highly organized in workflow and keeping of records.
- Ability to effectively present information and respond to questions from employees, customers and the general public.
- Be capable of managing multiple priorities and able to prioritize work assignments.
- Able to maintain strict confidentiality relative to working within the work areas and with assigned work.
- Ability to analyze financial data and prepare spreadsheets.
- Ability to multi-task, prioritize and meet deadlines.
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## **PHYSICAL DEMANDS**

The physical demands described on the attached "Physical Demands of Position" chart are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. See attached "*Physical Demands of the Position*".

## **CONFIDENTIAL INFORMATION**

This position has access to confidential information: Corporate, property and tenant information, company tax information.

## **COMPANY FUNDS**

This position does not have access to company funds.

**SAFETY**

Incumbent is required to comply with established safety work practices and attend all safety-related training provide or made available by the Coachella Valley Housing Coalition.

***Equal Opportunity Employer***

<b>Asset Management Specialist</b>	<b>Wage Range</b>	<b>Non-Exempt Status</b>
<b>Step 10</b>	<b>\$19.0991 / hour</b>	
<b>Step 15</b>	<b>\$24.3758 / hour</b>	

**ACKNOWLEDGEMENT**

I have reviewed and been provided a copy of the Asset Management Specialist position job description and agree it is an accurate representation of the responsibilities of my job. I understand that as the Asset Management department needs change, my job description may change. I, therefore, understand that I may be asked to perform activities, duties, and assume responsibilities not listed in this job description.

<i>Signed - Employee</i>	<i>Date:</i>
<i>Signed – Supervisor</i>	<i>Date:</i>

cc: Supervisor, Personnel File

Approvals: Dept Dir [  ] HR [  ] Ex. Dir [  ] REV. March 2023

## PHYSICAL DEMANDS OF POSITION

Job Title: Asset Management Specialist Date: [Click here to enter a date.](#)

How many hours are worked per day? 8 hours

**When completing this form, look at the job from a typical/average workday perspective.**

PHYSICAL ACTIVITY	Percentage Time Designation			
	Rarely < 1%	Occasionally 1-33%	Frequently 34-66%	Continuously 67-100%
Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Use hands to finger, handle or feel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reach with hands and arms over shoulder	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reach with hand and arms over head	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Climb or balance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stoop, kneel, crouch, or crawl	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talk or hear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Taste or smell	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

i.e., Position requires standing 1/3 of the time.

**Does this job require that weight be lifted or force be exerted? If so, how much and how often?**

WEIGHT	Percentage Time Designation			
	Rarely < 1%	Occasionally 1-33%	Frequently 34%-66%	Continuously 67%-100%
Up to 10 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Up to 25 pounds	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 50 pounds	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 100 pounds	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than 100 pounds	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

i.e., Position requires lifting 1/3 of the time up to 10 pounds.

**Does this job have any special vision requirements? Check all that apply.**

- Close Vision (clear vision at 20 inches or less)
- Distance vision (clear vision at 20 feet or more)
- Color vision (ability to identify and distinguish colors)
- Peripheral vision (ability to observe an area that can be seen up and down or to the left and right while eyes are fixed on a given point)
- Depth perception (three-dimensional vision, ability to judge distances and spatial relationships)
- Ability to adjust focus (ability to adjust the eye to bring an object into sharp focus)
- No special vision requirements

**List specific job duties that require the physical demands selected above:**