

Credit Analyst, Seniors Housing & Care

Tortoise invests in assets and services that serve essential needs in society and can also serve essential needs in clients' portfolios, such as diversification and income. Tortoise's expertise spans traditional energy investing across the entire energy value chain, sustainable infrastructure including wind, solar and water infrastructure, credit investing, direct lending to social infrastructure projects and index construction. Through a variety of investment vehicles, Tortoise provides a wide range of client solutions, focused on their evolving needs. For more information, please visit www.tortoiseadvisors.com.

Tortoise is seeking a Credit Analyst, Seniors Housing and Care in the New York City office. We will also consider candidates in the Kansas City area and the position may sit in either location. The Credit Analyst, Seniors Housing & Care will use Tortoise's unique approach and research methodologies to perform fundamental credit analysis across the seniors housing and care sectors, tracking and monitoring existing holdings and evaluating potential investments.

Responsibilities

- Evaluate and monitor the credit quality characteristics of seniors housing and care securities through (i) review and analysis of financial and operating profiles of obligors (fundamental credit, risk, and ratio analysis including, but not limited to, liquidity, profitability, and leverage), (ii) legal document review and covenant compliance, (iii) peer group comparisons, and (iv) review of local economic and sociodemographic market data, public sector trends and policy environments
- Prepare and present written credit reviews of existing seniors housing and care investments backed by a formulated, independent recommendation and outlook
- Assist in preparing pre-purchase memos for potential seniors housing and care investments
- Perform ad hoc research projects
- Maintain proprietary credit research database for seniors housing and care
- Communicate seniors housing and care portfolio direction and performance to firm leadership
- Ensure sound investment process is followed and consistently communicated
- Stay abreast of investment, economic, legal, and business issues and market trends
- Foster high level of professionalism, client service and responsiveness in working relationships across teams
- Help devise procedures and processes to make implementation of investment strategies efficient and scalable
- Support client service, marketing and business development efforts

Qualifications

- Bachelor's degree in finance, accounting, economics or other investment related field
 - MPA, CPA, CFA or JD preferred
 - Minimum of 3-5 years of experience in credit analysis and research, debt financing, and/or balance sheet lending and investing in independent living, assisted living, memory care, and skilled nursing facilities
 - Accounting, quantitative, technical, analytical, critical thinking, communication, presentation and financial modeling abilities required
 - Advanced Microsoft Excel skills
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- Deep understanding of government agency enhancement, such as HUD/FHA Sec. 232 Mortgage Insurance and USDA Guaranteed Mortgage Loan programs, as well as Fannie Mae Seniors Housing Program
- Demonstrated high level of self-motivation, drive and analytical skills to accomplish the team's goals
- Ability to prioritize, organize and maximize time management
- Ability to multi-task and simultaneously move forward on multiple projects
- Ability to explain complex credit issues in simple language
- Willingness to work in a small entrepreneurial team environment and adapt to changing priorities

We welcome your interest in being a part of the Tortoise team. We offer our associates an innovative and challenging place to work with camaraderie and teamwork. We are a growth-oriented, entrepreneurial culture that respects people and values talent, experience and ambition.

To apply for the Credit Analyst, Seniors Housing & Care position, please send a resume and cover letter to Careers@tortoiseadvisors.com.

EOE/M/F/D/V
