



POSITION OVERVIEW AND QUALIFICATIONS

Position: Credit Union Relationship Manager

Location: AVANA Capital, Arizona Office

Hours: Full Time

Years of Experience: 7-10

Education: Bachelor's degree (Minimum)

Travel: Yes

Relocation: Yes

About AVANA Companies

AVANA Companies is an AI Investment and Lending platform focused on small businesses lending in America. The organization is comprised of a regulated Credit Union Servicing Organization (CUSO), Asset Management Firm, an FDIC Bank all of which support the lending platforms. Together with our growing mix of accredited investors, family offices, and institutional investors, we provide financing for permanent real estate mortgage loans under the United States SBA program, construction loans, small balance unsecured loans and bridge loans. Our company has launched two platforms recently - a small business lending platform (LendThrive™) that will drive online originations for small balance lending on working capital, equipment, inventory and accounts receivable. Our second platform (EqualSeat™) is to provide access to retail investors to co-invest with institutional investors in SME loans.

Job Summary

Seeking an experienced Banker or Credit Union Executive to assist with identifying participant Credit Unions and placing loan syndications on behalf of Extensia, an affiliated Credit Union Servicing Organization (CUSO) under Avana Companies. The Credit Union Relationship Manager is responsible for the market penetration and growth of our credit union lender network and ensures that lending opportunities sourced and originated by the business development team can be financed quickly, easily and in sync with budget forecasts. The role is a strategist who will facilitate the participation lending goals of the credit union utilizing the CUSO. This will involve regular credit union visits and industry events.



Essential Job Functions

The Credit Union Relationship Manager will be responsible for growing the membership base through consistent outreach and tracking loan preferences/restrictions of potential participants in a company-wide CRM. They will be responsible for preparing materials and information memorandums to be shared with potential investors for loan opportunities originated by Extensia. They will also leverage the existing network and coordinate with the sales teams to identify both lead and participant lenders for loans in late stages of the sales pipeline. The role will also involve supporting the marketing department in development of pitch materials, newsletters, information memorandums, etc., aiding the sales team with serving its clients and prospects.

Duties and Responsibilities

- Responsible for growing the membership base through consistent outreach and tracking loan preferences/restrictions of potential participants in a company-wide CRM.
- Responsible for preparing materials and information memorandums to be shared with potential investors for loan opportunities originated by Extensia.
- Leverage the existing network and coordinate with the sales teams to identify both lead and participant lenders for loans in late stages of the sales pipeline.
- Involved in supporting the marketing department in development of pitch materials, newsletters, information memorandums, etc., aiding the sales team with serving its clients and prospects.
- Have a strong credit union lender network that is in alignment with the regional and geographic needs sourced by the business development staff, the Extensia book of business and Extensia's strategic direction.
- Support the CUSO by coordinating investment analysis, investor reporting, due diligence, and other ad hoc investor requests
- Collaborate with prospective fund investors throughout the due diligence process.
- Communicate Fund performance to existing and prospective investors.
- Leverage an industry-leading analytics foundation to further investment strategy and drive performance.
- Have solid leadership qualities and be a well-organized, self-motivated professional with excellent listening and communication skills.
- Exhibit sound, independent judgment and have a proven track record for multi-tasking and performing duties in a fast-paced environment.



Required Education, License and Certification

- Bachelor's degree and/or 7-10years relevant experience in Banking or Credit Union industry.
- Financial and Credit acumen (Understanding deal structure, covenants, financial statements, general strengths and weaknesses of a deal and communicating credit to potential participating Credit Unions.
- Strong understanding Securities and Capital Markets, Credit Union experience preferred.
- CUDE Designation preferred.
- Proficiency in Word, Excel and PowerPoint.
- Solid writing/presentation skills (organized, concise).
- Ability to leverage other internal resources, groups, etc.
- Ability to meet deadlines and multi-task.
- Strong critical thinking skills (ability to analyze, review and process information thoughtfully).
- Professional and available/reliable.
- Communication skills (both written and oral).
- Attentiveness (good listener, takes thoughtful notes).
- Initiative (proactive and ability/willingness to work independently).

Desired Characteristics

- Positive and professional attitude
- Self-motivated
- Team oriented, demonstrates a willingness to assist other members of the firm
- Accuracy and strong attention to details

Salary commensurate with experience. All candidates will be required to provide references.

Send your resume or CV to careers@avanacapital.com with subject title as "Application for Credit Union Relationship Manager".

For more information about AVANA Capital, please visit our website at www.AVANACompanies.com.