
POSITION OVERVIEW AND QUALIFICATIONS

Position:	Portfolio Retention Officer
Location:	Arizona/Utah
Hours:	Full Time
Years of Experience:	At least 4 years
Education:	Bachelor's Degree
Travel:	Yes
Relocation:	No
Apply directly at:	avanacompanies.bamboohr.com/jobs

Winning Aspiration

Preserve wealth and generate income for our investors by providing loans with speed and certainty of execution to help entrepreneurs thrive.

Job Summary

We believe our families are the most important people in our lives. We believe that our work should speak for itself and we believe that everyone should be given a chance to succeed and grow. We also believe there is no substitute for hard work and that when we falter, we get up and do it again. We come to work with one singular goal and that is to create jobs and provide clean energy in America. We believe in talking less and executing as per our client's timeline. Do you see yourself thriving in an entrepreneurial culture and spending time with disciplined business warriors? If so, then we invite you to read on.

We are an AI driven small business lending and investment platform company that has an immediate full-time opportunity for a customer service and sales oriented professional. The Portfolio Retention Officer is responsible for borrower retention, focused on building borrower relationships and monitoring servicing portfolio, in order to maintain and develop our borrower network. Ensure that Extensia has the minimum run-off to the servicing portfolio by retention of as many loans as possible through refinance and/or loan modifications. In addition, increase our servicing portfolio by sourcing new lending opportunities through our current borrower network.

About AVANA Companies

AVANA Companies is an AI Investment and Lending platform focused on small businesses in America along with regulated CUSO, Asset Management Firm and a FDIC Bank. 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, traditional secured loans, small balance unsecured loans and bridge loans. At AVANA Companies, we specialize in lending to specific niche industries that we're highly knowledgeable in, such as hospitality, elderly care facilities, and healthcare facilities, because it enables us to provide the best possible service for our borrowers and minimize risk for our investors.

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.

Duties and Responsibilities

Servicing Portfolio Loan Retention & Expansion (60%)

- Build strong relationships with Extensia's existing borrowers by utilizing loan servicing data. Develop a strong rapport and earn their trust.
- Identify and engage them in conversation and negotiation pertaining to loan opportunities to retain loan servicing business and revenue.
- Work with existing borrowers to identify additional loan opportunities on their schedule of real estate owned.

New Loan Origination (25%)

- Facilitates self-sourced commercial real estate lending to credit unions through member inquires, direct marketing, and networking events.
- Maintains loan files to ensure proper order and content. Maintains detailed contact records to ensure proper documentation of procedure and follow up with borrowers and credit unions.
- Submits CRE loans that meet the underwriting criteria and asset needs of targeted credit unions. Enhances and expands relationships with current credit union partners.

Collaboration with Participations (15%)

- Work closely with participations department to secure lender groups for internal refinances and new lending opportunities.

Required Education and Qualification

- Minimum 4 years commercial real estate experience
- Education or experience equivalent to a Bachelor's Degree
- Proficiency in MS Word, Excel and PowerPoint
- Ability to work in a fast-paced and multi-national environment
- Ability to multi-task, solve problems and think quickly
- Strong attention to details, highly organized and ability to notice data discrepancies in documents.

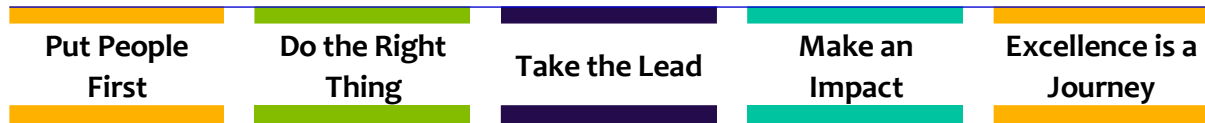
Desired Characteristics

- Strategic thinker
- Effective time management
- Positive and professional attitude
- Self-motivated
- Team oriented, demonstrates a willingness to assist other members of

- the company
- Accuracy and strong attention to details

Commitments

As a member of the AVANA team, you will be expected to demonstrate effective customer service in alignment with both the culture and goals of AVANA Companies, along with demonstrating a high level of client relationship management that aligns with AVANA's core values of Putting People First, Doing the Right Thing, Taking the Lead, Making an Impact and understanding Excellence is a Journey.



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