

# Investor Relations Associate



**NATIONAL EQUITY FUND, INC.** is a leading non-profit syndicator of Low-Income Housing Tax Credits (LIHTC) with a mission to create and deliver innovative, collaborative financial solutions to expand the creation and preservation of affordable housing. We strive to be a diverse, equitable, and inclusive place to work so that our team has the experience and knowledge to effectively support our partners and communities.

## OVERVIEW

The Investor Relations Associate will assist Investor Relationship Managers by gathering, organizing, preparing, and reviewing project and fund level due diligence for NEF's LIHTC Fund Offerings, Proprietary and Multi Investor Funds. This position enables the relationship managers to work on multiple projects/funds at one time and increase outreach efforts to current and new investors.

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## ESSENTIAL DUTIES

- Prepare required investor templates for previewing or securing approval of potential investments with proprietary and multi-fund investors, including pipelines and Data Matrix tables.
- Assist in exploring the feasibility of investment including evaluating the project projections, market, and sponsor capacity.
- Structure and model economic impact/ IRR of potential property investments and incremental impact to funds. Build and maintain various fund-level analytics to build and manage upcoming funds.
- Assist Relationship Managers in underwriting prospective equity investments.
- Assist in preparing Investor investment committee write-ups and data tables, as well as assisting in project or fund closings.
- Assist with the project/fund closing process, including reviewing, and analyzing documentation for conformance with underwriting and materials sent to Investor.
- Gain a thorough understanding of tax laws related to the LIHTC and Historic Credits. Become proficient in understanding secondary financing, including CDBG, HOME, AHP, and other local funds. Develop and maintain extensive knowledge about real estate underwriting and Section 42 requirements.
- Coordinating documentation on specific project investments required to be reviewed by third parties for NEF proprietary and multi-investor funds. The analyst may also assist in presenting and preparing material for the third-party due diligence review of NEF's fund investments and preparing backup materials for proprietary investor equity disbursements.
- Perform other duties as assigned or requested.



## THE IDEAL CANDIDATE

- B.A. in finance, economics, accounting urban planning, or equivalent job experience.
- 2-4 years of business experience in underwriting, structuring real estate projects and credit analysis, and a conceptual understanding of limited partnerships.
- Must be able to understand the core structure of LIHTC transactions, and how they relate to the investors' needs, as well as the other projects in the specific fund.
- Prior experience with affordable housing loans or investment and knowledge of state and local programs a plus.
- Ability to multi-task on numerous projects at the same time.
- Strong analytical skills and proficiency in Excel and PowerPoint. Ability to work with complex Excel underwriting spreadsheets.
- Must have excellent verbal and written communication skills and the ability to work in and promote a team-oriented environment.
- Ability to travel as needed.

## ABOUT NATIONAL EQUITY FUND

National Equity Fund, Inc., is a leading nonprofit Low-Income Housing Tax Credit (LIHTC) syndicator, asset manager, and pioneer in affordable housing with a mission to create and deliver innovative, collaborative financial solutions to expand the creation and preservation of affordable housing. Through its diverse multi- and single-investor funds, NEF generates opportunities rooted in its vision that all individuals and families across the country have access to stable, safe, and affordable homes that provide a foundation for them to reach their full potential. Since being founded by the Local Initiatives Support Corporation (LISC) in 1987, NEF has invested more than \$22.7 billion, which represents 231,500 new affordable homes for individuals, families, and communities in need across the country. NEF is Chicago-based and has donated more than \$220 million in grants to support LISC's nationwide community development work. To learn more about NEF's impact, innovative financial solutions, and opportunities, visit [www.nefinc.org](http://www.nefinc.org).

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We offer a competitive salary, along with a comprehensive benefits package.  
NEF IS AN EQUAL-OPPORTUNITY EMPLOYER

