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| Position Title | Head of Portfolio Management at Sefa (Social Enterprise Finance Australia Ltd) |
| Reporting To | Chief Executive Officer |
| Position Summary | The Head of Portfolio Management is responsible for leading the Sefa Social Finance team consisting of Relationship Managers, as well as consultants and Sefa Fellows. The role will oversee all aspects of the investment process, to help build and maintain a robust, diverse and profitable loan portfolio with social impact, engage with fellow impact investors and integrate with other business activities of the Sefa Group. |
| Location | Sydney with travel within Australia |
| Key Responsibilities | <ul style="list-style-type: none">• Lead the Social Finance team consisting of Relationship Managers and consultants in Sydney, Melbourne and Brisbane.• Drive business development for social finance opportunities in collaboration with the rest of the Sefa Group.• Assist the Social Finance team in allocating pipeline and conducting due diligence on transactions.• Manage Investment Committee process including timing of papers, quality of due diligence, annual credit review cycle and checks of lending conditions.• Coordinate liquidity requirements for disbursements and repayments with CEO and COO.• Oversee ongoing monitoring of loan portfolio in terms of debt serviceability and social impact.• Lead due diligence on complex and innovative transactions.• Assist in developing new business and partnership opportunities with a focus on social finance collaboration and funding pools.• Contribute to strategy and execution for Sefa's social finance / investment readiness products and advisory services.• Deliver advisory engagements, with a focus on capital structuring, capital raising support and payment-by-outcome tenders.• Assist in setting up and managing a Sefa syndication business model (revenue and risk |



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| | <p>management focus) for co-investors.</p> <ul style="list-style-type: none">• Liaise with potential co-investors and foundations for syndicated and blended transactions, working with Sefa Partnerships where relevant.• Represent Sefa at events and conferences. |
| Knowledge and Skills required | <p>Essential</p> <ul style="list-style-type: none">• Passion, energy, commitment and understanding of the impact investing / social finance / social enterprise sectors.• Secured property lending experience.• Strong analytical skills, e.g. around financial analysis and/or investment assessments.• Track record in originating, structuring and executing bespoke finance transactions for purpose-driven organisations.• Ability to work effectively with a variety of internal and external stakeholders.• Relationship building skills with a focus on patience and resilience, given the nature of the evolving impact investment sector in Australia.• Strong interpersonal and communication skills.• Ability to coach and lead members of the Social Finance team in developing their professional lending skills and personal profiles in the social finance sector. <p>Very helpful</p> <ul style="list-style-type: none">• Leadership and governance experience.• Understanding of the challenges facing social finance organisations in Australia. |
| Qualifications | <ul style="list-style-type: none">• Degree education or equivalent experience. |