



## **Associate/Senior Associate– Real Estate Private Capital**

### **COMPANY**

Westmount Realty Capital, LLC, a Dallas-based, privately held commercial real estate development and investment management company with exceptional performance specializing in value-add and opportunistic real estate investments. With an entrepreneurial spirit and proven 30-year track record across several market cycles they have steadily built up a portfolio of over 13 million square feet of industrial and office properties and 3,000 multifamily units located nationally.

### **OPPORTUNITY**

Westmount is well-positioned and capitalized to expand its aggressive acquisition program, and is seeking an **Associate/Senior Associate – Private Capital**. In this position you will be a key member of the private capital team assisting in raising equity capital for our projects from RIAs, fee only financial planners and high net worth investors.

### **KEY RESPONSIBILITIES / DUTIES**

The activities listed here are not all-inclusive; rather, they indicate the types of activities normally performed by this position. The successful candidate will be able to demonstrate core competencies in the following areas:

- Analysis of new investment opportunities
- Creation of highlight sheets, pitch decks other marketing materials as needed.
- Preparation of presentations to various audiences
- Work with databases and Salesforce to identify and reach out to prospective equity partners.
- Maintaining activities in Salesforce
- Raise equity capital for each of our projects.
- Develop and execute a detailed sales plan and achieve or exceed sales quota.
- Prioritize new opportunities and engage clients proactively on a daily basis
- Manage a sales pipeline and monthly sales forecast and track activities within CRM application
- Assist in preparation of investment memorandums.
- Analyze pro-forma assumptions.
- Performing market research on upcoming deals
- Various ad-hoc projects in support of the firm's efforts
- Have of obtain a Series 65 or Series 66 FINRA license
- Assisting the Director – Private Capital as needed

### **QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

## **EDUCATION and EXPERIENCE**

- BS or BA in Business, Finance, Real Estate or related field.
- 2-5+ years of previous capital markets experience, previous experience within the independent RIA market with key contacts may be substituted for specific industry experience.
- An understanding of, and demonstrated experience in, areas of real estate finance, property valuation and equity investment analysis.
- An understanding of, and demonstrated experience in, areas of industrial, office and multi-family
- Must have a quantifiable track record in business development

## **COMMUNICATION SKILLS**

- Excellent written and verbal communication skills.
- Strong organizational and analytical skills.
- Ability to effectively present information.
- Ability to respond effectively to sensitive issues.
- Must have developed relationships and the proven ability to further develop, cultivate and manage high quality relationships with equity partners, RIAs, Fee-only financial planners, High Net Worth investors
- Must work well in a multi-functional collaborative environment and demonstrate a strong work ethic and committed client service

## **REASONING ABILITY**

- Ability to comprehend, analyze, and interpret complex legal and financial documents necessary to communicate with clients.
- Ability to solve problems.
- Requires advanced analytical and quantitative skills.

## **OTHER SKILLS and/or ABILITIES**

- Intermediate to advanced skills with Microsoft Office Suite.
- Advanced knowledge of Excel
- Self-starter” with the ability to prioritize workflow and meet demanding deadlines in a fast-paced environment
- High attention to detail
- Outstanding interpersonal and communication skills