

## **FULL TIME POSITION:**

### **Financing Account Manager, NYC Business Solutions Staten Island Center**

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#### **Job Description:**

The Financing Account Manager will be responsible for working with Staten Island entrepreneurs that were impacted by Hurricane Sandy who are in need of financing assistance and the other relevant services they need to recover from the storm and reach their business goal. The position requires experience with providing direct small business assistance, as well as in-depth knowledge of small business lending, financial analysis and credit analysis.

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#### **About NYC Business Solutions:**

NYC Business Solutions is a set of services offered by the New York City Department of Small Business Services (SBS) to help businesses start, operate and expand in New York City. NYC Business Solutions has been at the forefront of the Mayor's commitment to help business customers, providing small businesses and entrepreneurs with the ability to access free services by phone, online, or in person at NYC Business Solutions Centers located in business districts throughout the five boroughs. The NYC Business Solutions set of services consists of: Business Courses, Legal Assistance, Financing, Incentives, Navigating Government, Recruitment, Training, Selling to Government and M/WBE Certification. In 2012, NYC Business Solutions helped over 10,500 businesses throughout New York City to start, operate, and expand.

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#### **Specific Responsibilities:**

##### **Business Services:**

- Assist businesses in obtaining financing by identifying the appropriate lender(s) for the business's need and preparing loan packages (developing, gathering and reviewing financial documents, preparing loan applications, reviewing business plans, etc.)
- Develop relationships with banks, credit unions, alternative lenders, credit building organizations and community development organizations that can provide complementary services to NYC Business Solution Center customers that need a loan
- Conduct courses in financial management and access to financing in order to better prepare customers to receive services and/or manage their loan
- Participate in financing service working groups with other Financing Account Managers from NYC Business Solutions Centers across the city in order to identify best practices, improve efficiencies and overcome obstacles to achieving outcomes

##### **Marketing and Sales:**

- Market NYC Business Solutions and its services to new and existing business customers through direct business outreach activities
- Leverage partners as referral sources for financing customers who require loan packaging assistance
- Acquire a sufficient volume of new customers with a need for NYC Business Solutions Financing services to ensure the center's quarterly and annual goals can be achieved
- Develop targeted sales strategies to acquire customers in low to moderate income areas with goals for customer acquisition, measure the success of those strategies on an ongoing basis, and adjust course as needed in order to ensure that sales targets are being achieved
- Develop and maintain a strong understanding of the borough of [Borough], including its neighborhoods, business community, and lenders
- Attend evening and morning networking events, panels, and business socials as a means of conducting business development, as needed

##### **Work Management:**

- Create and maintain complete records of customer accounts, including detailed content on sales and service delivery activities completed and full profile information for the business customer, in the system's CRM database
- Respond to all customer inquiries in a timely and appropriate manner, in accordance with quality assurance best practices and Center standards
- Attend trainings and mentoring sessions as provided by NYC Business Solutions in order to enhance financing skills
- Provide feedback to team members, NYC Business Solutions Centers, and SBS Leadership on an ongoing basis in order to improve the system's ability to achieve outcomes and provide high-quality financing services

### Preferred Skills:

- Extensive experience in small business lending
- A strong belief in the potential of small businesses and the value of understanding their needs and helping them to succeed.
- Strong understanding of small business lending policies and practices including developing and reviewing financial statements, loan packaging and loan underwriting
- Understanding of commercial banking regulations, operations and credit practices
- Proven track record in acquiring and retaining business customers
- Demonstrated knowledge of small business assistance and business support programs in New York City a plus
- Experience using customer relationship management tools or other database systems in order to track and manage services and outcomes
- Ability to manage towards goals in order to ensure the successful achievement of those goals by specific deadlines
- Ability to work effectively under pressure in both a team and individual setting
- Strong interpersonal and relationship management skills
- The ability to communicate effectively verbally and in writing with a diverse array of internal and external stakeholders
- Flexible, adaptable, customer-focused, and goal-oriented with a commitment to high standards of excellence.
- Prior experience in a loan underwriting, loan consulting or accounting role a plus
- The ability to think innovatively and generate new ideas that can translate directly into results.
- Experience managing teams in a fast-paced work environment.
- Willing to work in Brooklyn, Lower Manhattan, Staten Island, or Queens.

### Qualifications:

- A baccalaureate degree from an accredited college and four years of satisfactory, full-time progressively responsible clerical/administrative experience requiring independent decision-making concerning program management or planning, allocation for resources and the scheduling and assignment of work, 18 months of which must have been in an administrative, managerial, executive or supervisory capacity.

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### How to Apply:

To apply, **please email** your resume and cover letter including the following subject line: **Financing Account Manager, SI**  
to: [careers@sbs.nyc.gov](mailto:careers@sbs.nyc.gov)

### ALSO Apply to:

- **For Non-City/External Candidates:** Visit the [External Applicant NYC Careers site](#) and apply for this position by entering Job Title: Financing Account Manager , SI
- **For Current City Employees:** Visit [Employee Self-Service \(ESS\)](#) to view and apply for available positions. Click on Recruiting Activities > Careers, and search for the specific Job Title: Financing Account Manager , SI

Salary: Commensurate with experience

***\* As this position is grant-funded, it is limited in time to the duration of the grant.***

NYC RESIDENCY IS REQUIRED WITHIN 90 DAYS OF APPOINTMENT

**NOTE:** ONLY THOSE CANDIDATES UNDER CONSIDERATION WILL BE CONTACTED.

If you do not have access to email, mail your cover letter & resume to:  
NYC Department of Small Business Services / Human Resources Unit  
110 William Street / New York, New York 10038