Job Description

Job Title:	Portfolio Management Coordinator
Reports To:	Director, Portfolio Management
Department/Location:	Corporate / Corporate Headquarters
Subordinate Positions:	None

Position Summary:

Portfolio Coordinator manages the equipment lease and finance portfolio operations for JDR clients, including banks, independent lessors, and manufacturer captives. Key responsibilities include contract and asset booking, invoicing and payment application, reconciliations, contract adjustments (modifications, extensions, paydowns), asset dispositions, and non-financial contract changes. Qualified candidates must have 2+ years of finance experience in equipment operations, lease/loan accounting, strong communication and problem-solving skills. The position requires flexibility and increased commitment during month-end close, balanced by lighter workloads in mid-month.

Key Responsibilities:

Portfolio Management:

- Booking and overall management of equipment lease and loan contracts (true leases, operating leases, lease purchase agreements, conditional sale agreements and variable rate leases and loans) for multiple clients.
- Perform mid-term financial changes to contracts, including restructures, extensions and partial terminations.
- Complete non-financial changes, including demographics, client-specific coding and late charge waivers.
- Review and perform contract dispositions.
- Create and audit customers (lessee) facing communications (invoices, ACH notices, letters, etc.).
- Trouble shoot issues presented by clients, research solutions, estimate resolution effort, complete statements of work, test multiple scenarios, inform the client on the cause and solution implemented.
- Identify, research, and recommend new modules, features, or processes that may benefit existing clients and enhance operational efficiency.

Client Relationship Management:

- Serve as the primary point of contact for assigned clients.
- Conduct monthly servicer meetings with meeting minutes and maintain communications to ensure client satisfaction.
- Ensure high levels of client satisfaction and resolve issues.

Company Events

- Attend company events & team building activities as requested.

Qualifications:

- 2+ years of finance experience in the equipment industry and an in-depth knowledge of the equipment finance business model, preferably with operations and lease/loan accounting knowledge.
- Knowledge of complex lease and loan structures, as well as lease & loan accounting.
- Excellent communication and interpersonal skills.
- Self-reliant, good problem solver and results oriented.
- Ability to manage multiple clients and priorities simultaneously.
- Knowledge of Microsoft Office Suite (or relevant tools), especially Excel.
- A customer-first mindset with a focus on delivering value to clients.

Preferred Skills:

- Bachelor’s degree in business, finance, accounting, marketing, or 2+ years of finance experience.
- Portfolio management tasks (booking, invoicing, payment application, dispositions, terminations, etc.)
- Familiarity with Aspire industry trends.

Work Environment/Conditions:

- Full-time position.
- Remote or in-office depending on the company’s policies.
- Flexibility and increased commitment during month-end close.