

## San Diego, CA – Portfolio Assistant – Property Management

### **STATUS**

Non-exempt

### **ACCOUNTABLE TO**

Property Manager, Senior Property Manager, Vice President

### **SCOPE OF RESPONSIBILITIES**

The portfolio assistant assists the manager(s) in the day to day management of all aspects of operation for the assigned portfolio, in accordance with the goals and objectives of the individual clients. Depending upon the composition of the property management team, the portfolio assistant may perform some of the duties of the administrative assistant and/or the portfolio administrator.

### **PRIMARY DUTIES AND RESPONSIBILITIES**

#### **Leasing**

- Works with manager(s) and leasing team members to ensure that all vacant space is in “market ready” condition.
- As directed by manager(s), reads new lease and prepares lease abstract.
- Shows space to prospective tenants as directed by manager(s).

#### **Financial and Reporting**

- Reviews annual CAM reconciliations as assigned by manager(s). Reports findings/recommendations to manager(s).
- Assists manager(s) with annual budgeting process, to include re-bid of service contracts as directed by manager(s).
- Reviews monthly operating statements and drafts monthly owner operating report for final review and approval by manager(s).

#### **Operations**

- As assigned by manager(s), responds to and resolves tenant concerns. Meets with tenants as required to ensure that tenant needs are met, and that high quality property management service is achieved.
- Performs weekly and/or monthly physical property inspections. Reports findings to manager(s). Follow through on any needed repairs or maintenance as directed by manager(s).
- Prepares vendor contracts for manager(s) review and approval.
- As assigned by manager(s), interfaces with property vendors and contractors to ensure prompt response to maintenance issues. Responsible for ensuring that on-going contracted vendor services are performed on schedule, and that services meet contract specifications.
- Reviews specifications and makes recommendations to manager(s) for necessary changes or updates.
- Request and review bids from contracted service providers; make recommendations to manager(s).
- As directed by manager(s), works with building engineers or contracted maintenance personnel to schedule repairs and work orders.

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### Tenant Improvement Construction

- Conducts walk throughs, as assigned by manager(s), with contractor and tenant during construction process.
- Attends construction meeting; takes meeting minutes.
- Maintains construction file.

### Tenant and Owner Relations

- Maintains courteous, service oriented rapport with tenants and owners.
- Promotes and fosters confident, comfortable relationships with tenants and owners.
- As directed by manager(s), supervises tenant move in and move out process.
- Conducts move in and move out walk throughs with tenant.
- Conducts new tenant orientation.
- As directed by manager(s), makes collection calls to delinquent tenants.

### Other

- Other duties as assigned.

### SUPERVISION EXERCISED

Provides support direction for building engineering staff on assignments and follows up with him/her to ensure completion of work. May also provide support direction for administrative assistant or portfolio administrator.

### MINIMUM REQUIREMENTS

- Minimum of five years of experience in the field of property management
- Understanding of the budget process
- Understanding of office procedures
- Highly literate in all MS Office applications
- Understanding of lease documents
- Ability to articulate and relate well with the public and maintain a pleasant, professional attitude at all times in an occasionally sensitive and challenging environment.
- Excellent verbal and written communication skills, with an emphasis on grammar and spelling abilities.
- Strong organizational skills and attention to detail.
- Strong customer service/people/team building skills
- Ability to read, understand and abstract leases
- Ability to read, understand and abstract contracts
- Ability to draft quality, well organized letters, reports and memos
- Ability to recognize and require high quality maintenance work
- High school diploma or G.E.D.

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