



Position Title: Portfolio Associate
Status: Full time (40 hours per week); non-exempt
Reports to: Director of Business Ventures Group

Key Responsibilities

As a part of the Business Ventures Group, the Portfolio Associate will work closely with MTI's Portfolio Managers, Business Development Director and the Director of the Business Ventures Group to accomplish the following tasks:

Act as point of contact for applicants to MTI's grant and loan programs

- Answer questions of potential applicants and inform about MTI product offerings
- Communicate with applicants throughout review process
- Deliver funding decisions to applicants via email or letter
- Schedule meetings between applicants and MTI staff

Serve as liaison to MTI's volunteer and third-party reviewers

- Schedule, coordinate, and communicate review meeting schedule to 100 MTI volunteer reviewers
- Coordinate reviews and set deadlines with third-party reviewers
- Provide review materials to all volunteer and third-party reviewers
- Assist with onboarding of new MTI volunteer reviewers
- Work with reviewers to maintain MTI's confidentiality and non-disclosure standards
- Attend review committee meetings

Assist MTI Portfolio Managers with Awards management

- Perform credit checks for awarded companies and file UCC liens as needed
- Prepare contracts for execution
- Maintain contract files (both electronic and hard copy)
- Prepare standard letters for awarded companies

Other Duties

- Make website updates for Business Ventures Group pages
- Schedule meetings for team
- Work with Portfolio Managers to schedule application deadlines

- Represent MTI at occasional trade shows and events
- Prepare spreadsheets and award information for Board of Directors
- Assist with planning and set up of MTI events
- Participate in Grant review meetings

Minimum Required Qualifications:

- Bachelor's degree required
- Strong critical thinking skills and attention to detail
- Self-directed or self-starting, with the ability to work both independently and collaboratively
- Customer service focus, both internal and external, with emphasis on confidentiality
- Strong written and verbal communication skills
- Ability to manage multiple priorities
- Proficiency with Microsoft Office Suite and database applications
- Occasional in-state travel
- Ability to lift up to 20 pounds