

Syndication Associate

POSITION OVERVIEW

The Syndication Associate will play a critical role in the syndicated loan process across a variety of industries including Energy, Healthcare, Commercial Real Estate, Middle Market Corporate and other commercial financing business lines. **The position location is open to Denver, CO or Tulsa, OK.**

POSITION DETAILS

- Draft syndication approval memos, offering memoranda, proposals, and financial presentations detailing client and transaction-related fundamental information including merits, risk, and risk mitigation.
- Work with senior Loan Syndications team members to review new lead agency opportunities presented by the Line of Business and collaborate with Sr. Team Leaders to devise key syndication terms including deal economics/fees and distribution strategy in order to achieve a successful syndication. Oversee analytical work product to support deal marketing and origination efforts.
- Prepare loan marketing packages for distribution to investors. Drive the preparation of offering and marketing materials for investors. Serve as point of contact for investors during and after syndication process. Answer investor underwriting and due diligence questions. Obtain investor commitments. Plan, manage, and track details for bank meetings and events. Keep active templates for pitch materials and offering memorandums with current information on both BOKF and the market.
- Actively source and use market information from third party providers of loan market data and maintain an active database of comparable transactions and competitors. Maintain databases of comparable transactions. Utilize public databases (e.g. Dealscan) and other resources to gather market information and compile reports and analyses of comparable transactions.

EDUCATION AND CERTIFICATIONS

This level of knowledge is normally acquired through completion of a Bachelors Degree and 1-2 years of loan syndications experience, or 2-3 years equivalent commercial lending experience.

PREFERRED EXPERIENCE

- Broad market knowledge
- Bachelors Degree and Formal Credit Training and/or Loan Syndications Experience
- Familiarity with banking loan policies and procedures, credit analysis, accounting
- Strong writing skills with the ability to summarize investment opportunities
- Exceptional communication and presentation skills.
- Ability to view and solve problems from customer's perspective.
- Self-starter who can handle responsibility, and take ownership of projects
- Ability to manage and prioritize multiple projects and track details.
- Strong organization, planning, and follow-up skills.
- Highest level of integrity, maturity, and an exceptional work ethic.

KEY RELATIONSHIPS

Internal – Relationship Managers, Credit Administration, and Credit Services

External – Loan investors, syndication professionals at other Financial Institutions

Supervision of Others – None

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