

# ROCKBRIDGE

## Job Description

### Position:

Associate: Portfolio Management

### Position Overview:

The Associate will report to the SVP, Finance, and support the Portfolio Management team, which is responsible for optimizing, monitoring, forecasting, and reporting the performance for existing and future Rockbridge investment platforms. The Associate must be a motivated self-starter and team player who enjoys contributing in a collaborative organization. The Associate should be a problem-solver who enjoys challenges and varied responsibilities at a fast-paced and dynamic organization, with a proven record of accomplishment of high achievement.

### Key Responsibilities:

- Construct and maintain complex excel financial models for investment funds and other vehicles (both existing and prospective)
- Model complex waterfall and promote calculations in Funds and Joint Ventures
- Monitor and provide analytical support for existing funds' use of investment capital (debt and equity)
- Model and monitor gross and net return calculations for all investment vehicles
- Provide analytical and model support for new strategic initiatives
- Work with asset management team to analyze and review asset-level forecast data
- Support Rockbridge goal of continuous improvement by identifying and executing on opportunities for process and technological improvement

### Job Requirements:

- Entrepreneurial individual with strong work ethic and high level of intellectual capacity, curiosity, and integrity
- Expert excel modeling skills
- 3 – 6 years of real estate / hospitality and/or private equity fund experience preferred
- 4-year college degree with outstanding record of academic achievement
- MBA preferred but not required
- Flexible and adept at multi-tasking in a fast-paced, deadline-sensitive environment
- Strong analytical ability and attention to detail
- Excellent interpersonal, organizational, and communication skills

### Company Overview:

Headquartered in Columbus, Ohio, Rockbridge is a private equity real estate firm with a focus on hospitality investments. Rockbridge has formed and managed seven real estate funds over more than fifteen years. Since 2000, Rockbridge's team has invested in over 200 hotels in 38 states as part of over \$5 billion of transaction value.

**Contact Information:** [ahdavidson@rockbridgecapital.com](mailto:ahdavidson@rockbridgecapital.com)