

Investment Associate – Tampa, FL

COMPANY:

WIM Resources, LLC dba Stonemont Financial Group, one of the nation's fastest growing private real estate investment and development companies, is currently seeking an Investment Associate in Tampa, FL. Stonemont Financial Group specializes in investing across a broad spectrum of real estate asset classes and geographies to deliver attractive risk-adjusted returns. Stonemont offers diversified and differentiated real estate investment strategies and vehicles to institutions, family offices, trusts and high net-worth individuals. Stonemont is a firm founded on a simple strategy: to combine the experience and resources of a large institution with the creativity and flexibility of an entrepreneurial firm. The company has been in a growth phase for the past few years and business continues to drive the need for continued growth for Stonemont.

POSITION OVERVIEW:

The investment associate will play a key role in supporting the full life cycle of industrial real estate development projects—from site acquisition and due diligence to entitlements, design, construction, and delivery. The ideal candidate has 3+ years of relevant real estate experience, a strong understanding of the development process, and a passion for industrial assets. This role offers exposure to all aspects of real estate investment and development, with opportunities for growth and advancement. The position will report directly to the VP of Development in Tampa, FL and will underwrite and assist in sourcing and managing development opportunities and select acquisitions in the Southeast market.

RESPONSIBILITIES:

- Support project underwriting, financial modeling, and investment memos for new development opportunities
- Conduct market research, site analysis, and feasibility studies
- Assist in land acquisition efforts including due diligence, zoning analysis, and contract review
- Coordinate with internal and external teams including architects, engineers, consultants, and municipalities
- Track project budgets, schedules, and milestone deliverables throughout the development process
- Prepare investment offering memorandums to present to equity partners, lenders and internal investment committee
- Develop new and cultivate existing broker relationships within the SFG market for data and pursuit of projects
- Draft LOI's – land and shell building acquisitions
- Assist with lease negotiations, tenant coordination, and asset stabilization efforts
- Assist in the management and execution of the existing portfolio, which includes over 5M SF across the state of Florida
- Maintain up-to-date knowledge of market trends, competitive projects, and investment metrics

REQUIREMENTS:

- BA/BS in Business, Finance, Accounting, Math, Economics, Real Estate, or other related field;
- 3+ years of previous analyst experience in commercial real estate, corporate finance or investment banking;
- Exceptional financial modeling skills and proficiency with Excel, Word and Powerpoint; Argus Enterprise experience a plus;
- Familiarity with real estate pro formas, capital stacks, and investment return metrics
- Knowledge of DCF, NPV and cash flow models
- Excellent work ethic, self-motivated, and proactive with a meticulous attention to detail;
- Ability to multitask, prioritize, and work well under pressure to meet established deadlines;
- Highly developed written and oral presentation and communication skills;
- Possesses overall intellectual curiosity regarding commercial real estate in an entrepreneurial environment; and
- Seeks challenges and self-development; demonstrates high levels of expertise and shows commitment, self-confidence and integrity.

COMPENSATION:

The chosen candidate will receive a competitive salary, bonus eligibility, unique employee investment opportunity and a benefits package which includes medical, dental, vision with cost of employee covered and a 401(k) plan. **NOTE: This job description is inclusive of but not limited to the job specifications contained herein. Additional duties or job functions may be required as deemed necessary.**