

# momentus capital.

## Position Profile

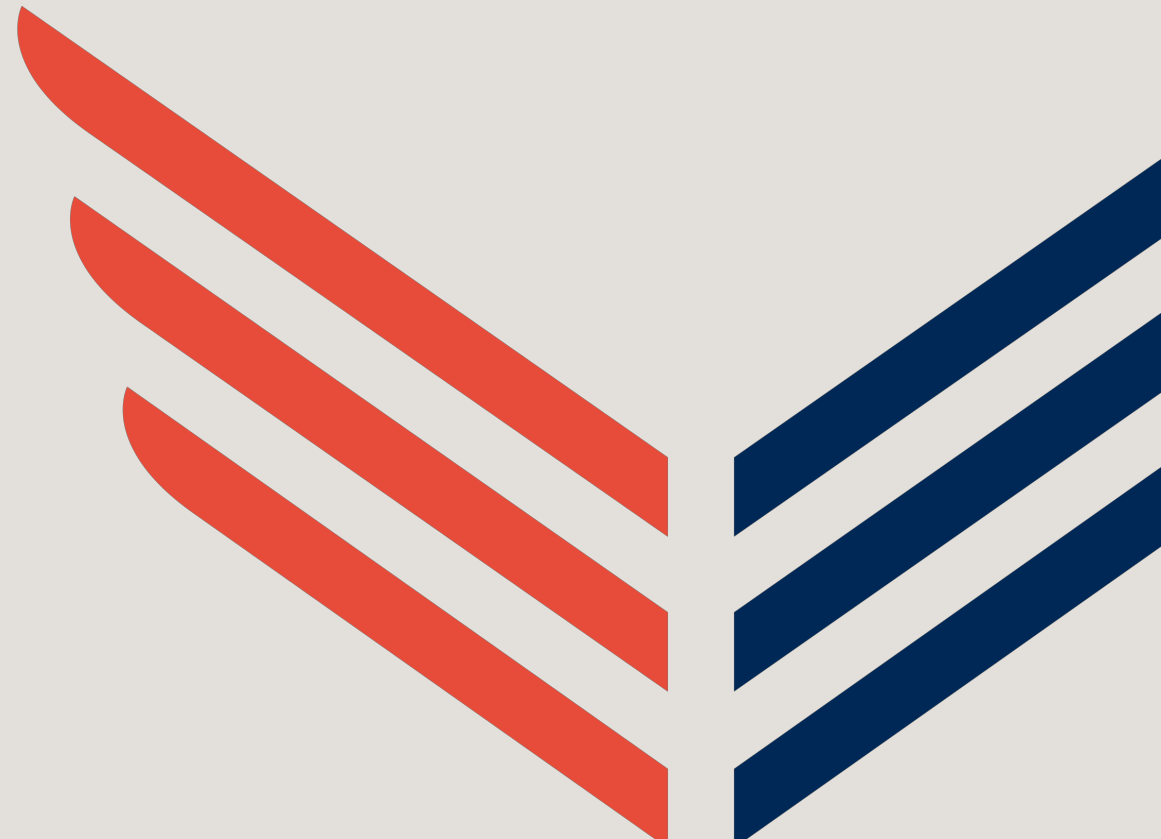
Momentum Capital

Chief Lending Officer



BroadView

PRESENTED BY: TALENT PARTNERS



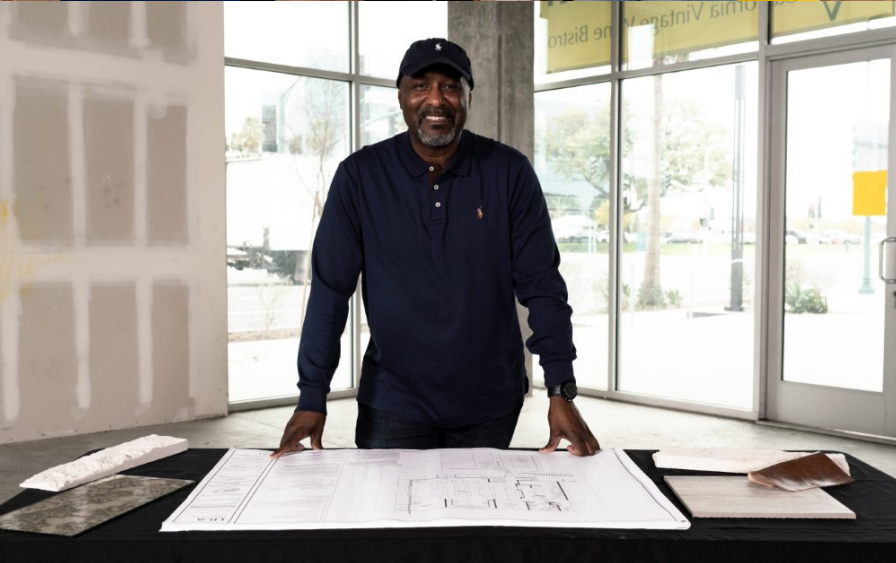


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# The Organization





# Who We Are

The Momentus Capital branded family of organizations – which includes Capital Impact Partners and CDC Small Business Finance and Momentus Securities (an SEC-registered broker-dealer, MSRB-registered, FINRA/SIPC member) – are transforming how capital and investments flow into communities to provide people access to the capital and opportunities they deserve. We are working to reinvent traditional financial systems and advance locally-led solutions that create economic mobility and generational wealth. Through our continuum of financial, knowledge, and social capital, we offer a comprehensive package of loan products, impact investment opportunities, training and business advising programs, and technology solutions. Our holistic and streamlined approach offers comprehensive solutions for small business entrepreneurs, real estate developers, community-based organizations, and local leaders at every stage of growth, from inception to expansion. When these leaders have the opportunity to succeed, their communities, their residents – and our country – thrive.

**Mission:** We help build communities and small businesses by providing access to the capital and opportunities they deserve.

# What We Do

## A Continuum of Capital, Investment, & Support Solutions

The Momentus Capital branded family of organizations is helping build communities and small businesses by providing access to the capital and opportunities they deserve. Our continuum of financial, knowledge, and social capital supports entrepreneurs and community-based organizations at every growth stage. By transforming outdated financial systems, we can advance locally-led solutions that create economic mobility and generational wealth.

## Our Solutions

- Business Advising
- Capacity Building
- Community Development & Facility Lending
- Community-Focused Investment Bank Services
- Commercial Real Estate Lending
- Impact Investing
- Small Business Lending



**Vision:** An economic system that respects and uplifts all peoples' right to achieve the dreams they have for themselves, their communities, and generations to come.

# Momentum Capital by the Numbers



80+

years of experience  
working with communities  
and investors



\$3B

in assets under  
management

**\$23+ billion** in  
financing and  
investments



250k

jobs created or  
preserved

**12,000** small  
businesses supported



5M

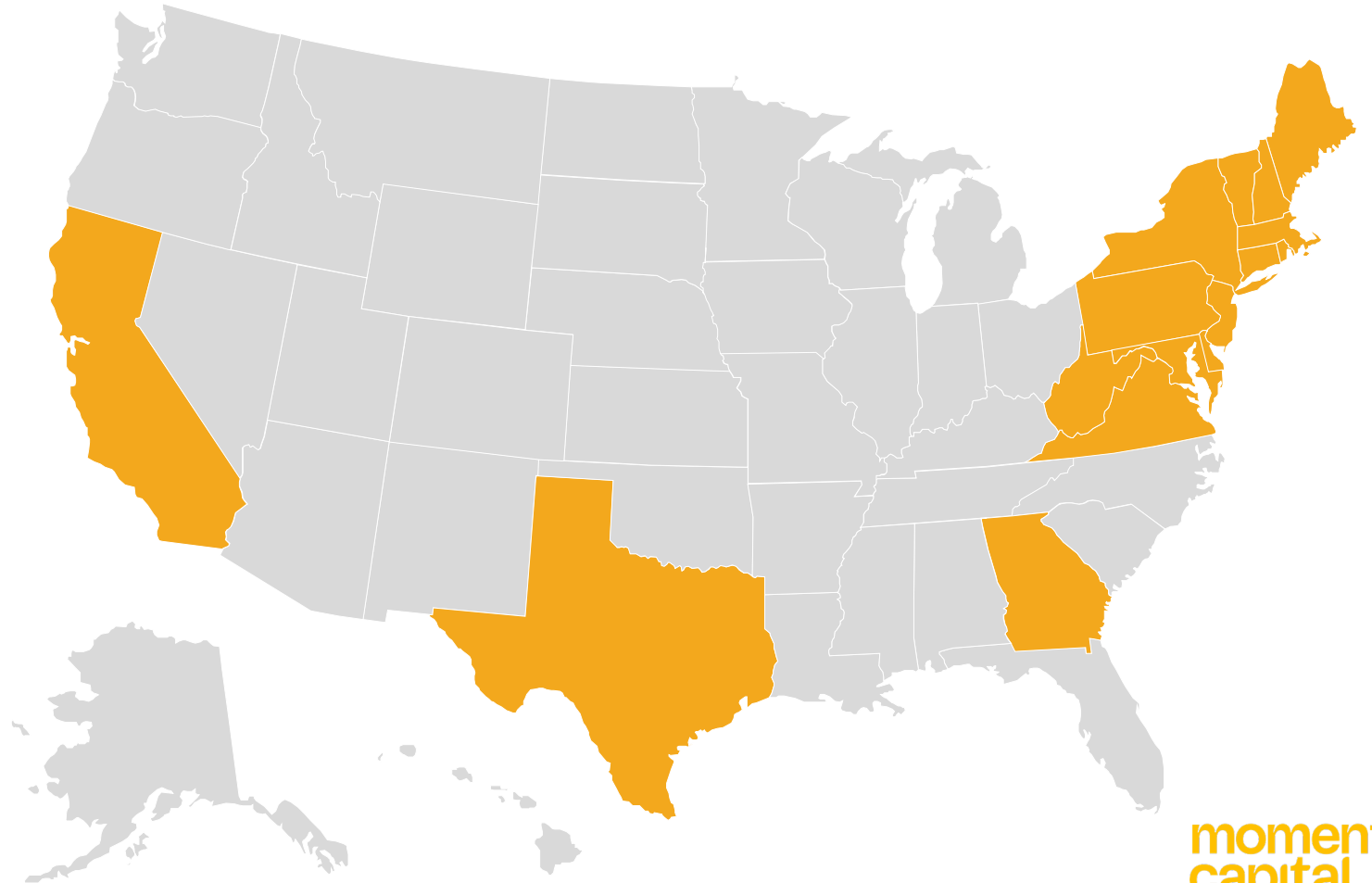
people served

# Location & Geographic Footprint

**The CLO is expected to operate with a national lens, supporting a geographically dispersed team and portfolio.**

Momentum Capital operates a national lending platform, with activity across multiple regions including key markets in:

- California
- New York
- Texas
- Georgia
- Mid-Atlantic and Northeast regions
- Additional markets aligned with lending and investment activity



# The Candidate Profile



# Position Description



**Title:** Chief Lending Officer



**Organization:** Momentus Capital



**Reports to:** Chief Executive Officer



**Direct Reports, Department/Title:**

- Community Development Lending, Sr. Vice President
- Small Business Lending, Sr. Vice President
- Commercial Real Estate Team, Head of Commercial Real Estate
- Portfolio and Asset Management, Sr. Director
- Construction Management, Director of Construction Management



**Employee Count:** 307



**Location:** Remote, U.S.-based



**Website:** [momentuscap.org](https://momentuscap.org)





# Position Summary

The Chief Lending Officer (CLO) serves as the enterprise leader responsible for the strategy, performance, and governance of Momentus Capital's lending platform. Reporting to the President and CEO, the CLO holds full accountability for loan production, portfolio performance, product innovation, and credit quality across a multi-line lending business.

This executive operates at the intersection of growth, risk, and impact, ensuring the organization scales lending activity while maintaining disciplined underwriting, portfolio integrity, and regulatory compliance. The CLO is a member of the Executive Management Team and serves as a key liaison to the Board, regularly presenting on portfolio performance, risk posture, and capital deployment strategy.

The role requires an operator who can translate strategy into execution across a complex lending ecosystem while strengthening market positioning, capital deployment efficiency, and long-term portfolio health. This role is central to the organization's continued evolution from a traditional CDFI model to a fully integrated, mission-driven financial services platform, requiring both operational discipline and strategic adaptability.

# Required Knowledge, Skills & Abilities (“Must-Haves”)

**Enterprise Lending Leadership & P&L Ownership:** Enterprise leadership of a multi-product lending platform, with full accountability for loan production, portfolio performance, credit outcomes, and overall business line results, including demonstrated P&L ownership and the ability to operate lending as an integrated, performance-driven business.

**Organizational Leadership & Team Scale:** Proven operator with the ability to lead and scale multi-layered lending teams across origination, portfolio management, and related functions, including demonstrated success managing through leaders, building bench strength, and driving accountability across a complex organizational structure.

**Portfolio Performance & Credit Discipline:** Demonstrated ability to drive portfolio growth while preserving asset quality, credit discipline, and performance across economic cycles, including the judgment to recalibrate production, portfolio strategy, and resource allocation in response to market conditions.

**Enterprise Execution & Cross-Functional Integration:** Proven experience leading through scale and complexity, including driving cross-functional alignment and performance across a growing or evolving organization, with the ability to operate effectively within a working executive management team.

**Lending Expertise Across Markets & Asset Classes:** Deep expertise in commercial lending, structured credit, or community development finance, with the ability to operate across asset classes and execute within both mission-driven and market-oriented environments.

**Capital Markets & Product Strategy Orientation:** Strong capital markets and product orientation, including the ability to align lending activity with broader capital strategy, identify market dislocations, and inform the development or evolution of lending products that support institutional capital deployment.

# Required Knowledge, Skills & Abilities (“Must-Haves”) *continued*

**Regulatory & Compliance Leadership:** Experience operating in regulated financial environments, with direct accountability for audit, examination, compliance, and regulatory outcomes, including SBA and similar requirements.

**Executive Leadership & Stakeholder Influence:** Executive leadership presence with the ability to advise and influence the CEO, Board, and senior stakeholders, drive enterprise-level decision-making, and lead with judgment, humility, accountability, and resilience in a high-performance environment.

# Other Desired Skills & Abilities

- Experience supporting or contributing to the structuring, packaging, or execution of lending products for secondary markets or institutional capital channels, including exposure to securitization, loan sales, or capital markets transactions
- Familiarity with CDFI, impact investing, or mission-driven lending environments, or demonstrated ability to translate commercial lending expertise into mission-oriented contexts
- Experience operating in or alongside hybrid financial platforms that integrate lending, investment, or capital markets activities, with exposure to evolving or non-traditional business models
- Track record of working in environments undergoing growth, transformation, or operating model change, including the ability to navigate ambiguity and adapt to shifting organizational priorities
- Exposure to product development, innovation, or incubation processes, including partnering with strategy, capital markets, or product teams to bring new lending solutions to market

# Essential Duties & Responsibilities

## Enterprise Lending Strategy & Growth

- Define and execute a unified lending strategy aligned with enterprise growth, impact, and profitability objectives
- Drive disciplined loan production across community development, small business, and commercial real estate platforms
- Align lending strategy with enterprise capital deployment priorities and evolving market opportunities

## Financial Stewardship & Portfolio Performance

- Own portfolio performance, including growth, yield, credit quality, and risk-adjusted returns
- Make and execute business trade-offs across loan production, portfolio management, and resource allocation in response to market conditions, portfolio performance, and enterprise priorities

- Actively manage portfolio composition and production levels in response to asset quality, market conditions, and performance objectives
- Establish and manage KPIs, forecasts, and operating plans aligned to financial performance and accountability

## Product Innovation & Capital Deployment

- Lead the development and refinement of lending products aligned with institutional capital, secondary market execution, and enterprise strategy
- Identify and activate new lending opportunities that expand market reach and support scalable capital deployment
- Ensure lending activity is fully integrated with adjacent business lines, enabling the effective flow of assets into capital markets and investment platforms

*continued >*

# Essential Duties & Responsibilities *continued*

## Risk Management & Regulatory Oversight

- Maintain disciplined underwriting and credit standards across the lending lifecycle in partnership with Risk leadership
- Ensure compliance with regulatory requirements, audits, and examination processes
- Proactively monitor and manage portfolio exposure, performance trends, and emerging risks

## Governance & Board Engagement

- Serve as a key liaison to the Board Finance and Risk Committees
- Deliver clear, data-driven reporting on portfolio performance, credit quality, and lending strategy
- Inform Board-level decisions related to risk appetite, capital allocation, and portfolio direction

## Organizational Leadership & Execution

- Lead and scale multi-layered lending teams across origination, portfolio management, and related functions
- Establish performance expectations, operating cadence, and accountability across leadership levels
- Assess, develop, and strengthen leadership bench to support execution and future growth
- Drive execution against strategic priorities, ensuring the platform is operationally prepared for scale
- Drive a high-performance culture with clear accountability standards, operating effectively in an environment that emphasizes results, transparency, and continuous improvement

# Measures of First Year Success



## Strategic Planning & Enterprise Contribution

Shape the organization's three-year lending strategy, bringing a clear, actionable point of view aligned with enterprise strategy and capital priorities

Align lending strategy with capital deployment goals and evolving market opportunities

Establish credibility as a core member of the executive management team, contributing to decisions beyond the lending platform



## Organizational Assessment & Leadership Alignment

Complete a comprehensive assessment of the lending platform and leadership structure within the first 90–120 days, identifying gaps in capability, role alignment, and performance, and take action to ensure the team is positioned for execution

Reinforce trust, accountability, and leadership effectiveness across the platform to support execution



## Operating Model Implementation

Fully implement and operationalize the revised lending structure, including integration of origination, portfolio management, and construction oversight

Clarify roles, decision-making authority, and team structure to eliminate ambiguity and enable efficient execution

Transition the platform from assessment to execution within the first 120 days, establishing clear direction and momentum



## Portfolio Management & Business Execution

Demonstrate active management of the lending platform, balancing loan production with portfolio performance and asset quality, and exercising sound judgment in making trade-offs across growth, performance, and resource deployment

Ensure lending is managed as an ongoing business with clear accountability for performance outcomes, not a transactional function



## Platform Readiness For Scale

Navigate ongoing system implementation and organizational transition without disruption to performance

Position the lending platform for disciplined execution and readiness to scale in 2027

# Working Conditions & Travel



- This is a remote executive role with a national scope
- Regular travel is required to support Board engagement, team leadership, and external stakeholder relationships
- Travel includes participation in quarterly Board and committee meetings, leadership convenings, and key market or partner engagements
- The CLO is expected to maintain a visible leadership presence across the organization, balancing remote leadership with in-person engagement as needed

# Education Requirements



Bachelor's degree in Finance, Business, or related field required.

Advanced degree (MBA or equivalent) preferred.

# Compensation

Momentum Capital CLO salary is \$273,000 – \$350,000.

## **Total Rewards & Benefits:**

- Retirement & Wealth Accumulation
- 401(k) with up to 12% employer contribution (match + discretionary)
- Supplemental 457(b) deferred compensation plan for additional tax-advantaged savings
- Comprehensive Health Coverage
- Medical, dental, and vision plans with 100% in-network preventive care
- HSA and FSA options with employer contributions
- Income Protection
- Employer-paid life insurance (up to 3x salary)
- Fully funded short- and long-term disability coverage
- Wellbeing & Support
- Employee Assistance Program with 24/7 access
- Mental health, telehealth, and wellness resources
- Professional Development
- Tuition reimbursement up to \$5,250 annually
- Additional Benefits
- Monthly stipend to support work-related expenses
- Voluntary supplemental insurance options
- Time Off & Flexibility
- Competitive vacation, sick, and personal leave
- Paid holidays including year-end closure
- Summer hours with early Friday departures

Client Search  
Committee &  
BroadView Talent  
Engagement Team



# BroadView Talent Partners Team



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**How to  
Apply:**

**Interested and Qualified** candidates should contact  
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# Contact

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Monday – Friday  
07:00 AM– 7:00 PM ET

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## About BroadView Talent Partners

Executives in affordable housing, nonprofit, and middle market organizations retain BroadView Talent Partners to fill senior leadership team positions because they value our specialized knowledge and proven process for identifying executive talent using our unmatched national network, commitment to diversity, equity, and inclusion (DEI), and record of long-tenured placements.

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