

## DUTY STATEMENT ATTORNEY

### OUR VISION

Every Californian can build a thriving life in a stable home

### OUR MISSION

Deliver reliable financing solutions to advance housing opportunities for Californians

### EMPLOYEE INFORMATION

|                                                           |                              |                                   |                                                             |                               |
|-----------------------------------------------------------|------------------------------|-----------------------------------|-------------------------------------------------------------|-------------------------------|
| Employee Name                                             |                              |                                   | Effective Date                                              |                               |
| Classification<br><b>Attorney</b>                         |                              |                                   | Position Number<br><b>693-001-5778-901</b>                  |                               |
| Division/Section/Unit<br><b>Office of General Counsel</b> |                              |                                   |                                                             |                               |
| CBID<br><b>R02</b>                                        | Work Week Group<br><b>SE</b> | Location<br><b>Sacramento, CA</b> | Tenure<br><b>Permanent</b>                                  | Time Base<br><b>Full Time</b> |
| Immediate Supervisor                                      |                              |                                   | Supervisor Classification<br><b>Assistant Chief Counsel</b> |                               |

### POSITION DESIGNATED CONFLICT OF INTEREST

This position is designated under the Conflict-of-Interest Code. The position is responsible for making or participating in making governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of the appointment. Failure to comply with the Conflict-of-Interest Code requirements may void the appointment.

### CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS

This position requires the incumbent to communicate effectively orally and in writing in dealing with the public and/or other employees; develop and maintain knowledge and skills related to the position's specific tasks, methodologies, materials, tools, and equipment; complete assignments in a timely and efficient manner; and adhere to the Agency's policies and procedures regarding attendance, leave, and conduct. Must maintain regular and consistent attendance at such level as is determined at the Agency's sole discretion. Must be regularly available and willing to work the hours the Agency determines are necessary or desirable to meet its business needs.

#### **2 CCR § 172 – General Qualifications, states in pertinent part:**

The incumbent is expected to possess the general qualifications of integrity, honesty, sobriety, dependability, industry, thoroughness, accuracy, good judgment, initiative, resourcefulness, courtesy, ability to work cooperatively with others, willingness and ability to assume responsibilities and to conform to the conditions of work characteristic of the employment, and a state of health, consistent with the ability to perform the assigned duties of the class.

### DIVISION DESCRIPTION

The Office of General Counsel manages the legal affairs of California Housing Finance Agency (CalHFA) by providing advice on day-to-day operations and strategic initiatives. The Office of General Counsel also supports CalHFA's Asset Management, Financing, Single Family Lending, and Multifamily Lending Programs.

### POSITION DESCRIPTION

Under direction of the Assistant General Counsel, the Attorney provides legal support for the Agency's Multifamily and Single Family lending programs, including performing litigation duties, conducting statutory and regulatory research and analyses.

The duties contained in this job description reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. The incumbent of this position may perform other duties, commensurate with this

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| Employee's Name                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Classification<br><b>Attorney</b> |
| Division/Section/Unit<br><b>Office of General Counsel</b>                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |
| classification, as assigned, including work in other functional areas to cover during absences, to equalize peak work periods or to otherwise balance the workload. The duties and responsibilities include, but are not limited to the following: |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |
| <b>PERCENTAGE OF TIME</b>                                                                                                                                                                                                                          | <b>ESSENTIAL FUNCTIONS</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                   |
| 50%                                                                                                                                                                                                                                                | <b>Multifamily Lending</b><br>Reviews real estate and financial documents submitted in support of loan applications for financial assistance to develop multifamily rental housing and ensure the housing programs align with broader policy goals of the Agency. Works with Agency staff, borrowers, subordinate lenders, federal and local government agencies, title and escrow companies, and related legal counsel for each represented party to close loan transactions. Responsible for drafting transaction documents, including promissory notes, deeds of trust, regulatory agreements, subordination agreements, interagency agreements, loan agreements, escrow instructions and related documents. Analyzes transactions to ensure compliance with California real estate finance laws. Determines consistency with federal tax restrictions on revenue bond financing by analyzing the applicable laws, rules, and regulations. |                                   |
| 25%                                                                                                                                                                                                                                                | <b>Regulatory and Litigation</b><br>Analyzes, drafts, and provides advice or legal opinions to clients regarding litigation and legislation relating to affordable housing, real estate finance, and other issues as appropriate. Drafts and analyzes pleadings, motions, briefs, settlements, and other litigation documents. Researches and writes formal and informal legal opinions for specific program areas. Analyzes and interprets Federal, State, and local statutes, ordinances and regulations affecting Agency operations to ensure the compliance of Agency programs.                                                                                                                                                                                                                                                                                                                                                           |                                   |
| 20%                                                                                                                                                                                                                                                | <b>Single Family Lending</b><br>Reviews, analyzes, and drafts programmatic and transactional documents relating to the Agency's Single Family loan program and loan products. Works with Agency staff, originating lenders, loan servicers, title companies, and other participants in single family finance transactions. Handles issues relating to the purchase of loans from originating lenders, as well as issues that arise post-purchase, including servicing of loans, foreclosures, and other related matters.                                                                                                                                                                                                                                                                                                                                                                                                                      |                                   |
| <b>PERCENTAGE OF TIME</b>                                                                                                                                                                                                                          | <b>MARGINAL FUNCTIONS</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                   |
| 5%                                                                                                                                                                                                                                                 | Attends and participates in educational and training programs, undertakes on-the-job training and self-study. Participates in staff meetings, provides work status reports, and assists with special projects. Performs other duties as assigned within the scope of the classification.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                   |
| <b>PERSONAL CONTACTS</b>                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |
| <ul style="list-style-type: none"> <li>Daily contact with the general public, all levels of departmental staff, and as well as representatives from other State and county agencies.</li> </ul>                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |
| <b>SPECIAL REQUIREMENTS</b>                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |
| <ul style="list-style-type: none"> <li>Designated under Conflict of Interest Code.</li> <li>Active membership in the California State Bar</li> </ul>                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |
| <b>WORK ENVIRONMENT</b>                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |
| <ul style="list-style-type: none"> <li>Prolonged sitting</li> <li>Works in a high-rise building</li> <li>Uses a computer keyboard and reads from computer screens several hours a day</li> </ul>                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |
| <b>PHYSICAL ABILITIES</b>                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                   |

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| Employee's Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                      | Classification<br><b>Attorney</b> |
| Division/Section/Unit<br><b>Office of General Counsel</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                      |                                   |
| <ul style="list-style-type: none"> <li>Ability to transport up to 20 lbs.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                      |                                   |
| <b>TRAVEL</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                      |                                   |
| <ul style="list-style-type: none"> <li>Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.)</li> <li>Travel may include overnight stay.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                     |                      |                                   |
| <b>EMPLOYEE ACKNOWLEDGEMENT</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                      |                                   |
| <p>I have read and understand the duties listed above and I certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties as described above with or without reasonable accommodation. (If a reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with Human Resources.)</p> |                      |                                   |
| Employee Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Employee Signature   | Date                              |
| <b>SUPERVISOR ACKNOWLEDGEMENT</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                      |                                   |
| <p>I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee with a copy of this duty statement.</p>                                                                                                                                                                                                                                                                                                                                                              |                      |                                   |
| Supervisor Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Supervisor Signature | Date                              |