Family Office Advisor

Opportunity

Our client is a growing independent wealth management firm dedicated to serving ultra-high-net-worth individuals, families, and business owners. The firm is known for delivering highly personalized advice and exceptional client service while building long-term relationships founded on trust, responsiveness, and proactive planning. This is an opportunity to join a collaborative team focused on providing an elevated experience for some of the firm's most sophisticated client relationships.

Position Summary

The Family Office Advisor will work closely with ultra-high-net-worth families, many of whom have net worths exceeding $100 million, to provide highly personalized and comprehensive support. This individual will help oversee all aspects of the client relationship, anticipate needs, coordinate complex planning initiatives, and ensure an exceptional and seamless client experience.

The ideal candidate enjoys building meaningful relationships, managing complexity, and providing thoughtful guidance to clients whose financial lives extend well beyond investment management.

Key Responsibilities

- Develop trusted, long-term client relationships and deliver a concierge-level experience.
- Anticipate client needs and proactively identify planning opportunities.
- Guide clients through sophisticated financial planning, estate planning, wealth transfer, and legacy planning matters.
- Coordinate the implementation and follow-through of complex planning strategies.
- Prepare for and lead client meetings while ensuring the timely execution of all action items.
- Partner with the firm’s internal professionals and external advisors to deliver comprehensive, coordinated advice.
- Manage multiple complex client situations with responsiveness, discretion, and strong attention to detail.
- Serve as a knowledgeable resource as clients’ financial needs and priorities evolve.

Qualifications

The ideal candidate may come from a variety of professional backgrounds, including:

- Family Office
- Wealth Management
- Private Wealth
- Estate Planning
- Public Accounting

Candidates may possess one or more of the following credentials:

- CFP®
- CPA
- JD (Estate Planning or Tax background preferred)
- CFA
- Equivalent experience working with ultra-high-net-worth families will also be considered.

Preferred Experience

- Experience advising or supporting ultra-high-net-worth individuals and families
- Strong understanding of sophisticated estate planning and wealth transfer concepts
- Exceptional relationship management and communication skills
- Ability to manage multiple priorities and follow complex matters through completion
- Experience collaborating with investment, tax, legal, and other professional advisors

What Will Make You Successful

The successful candidate is intellectually curious, proactive, and naturally relationship-driven. This individual enjoys solving complex problems, anticipating clients' needs before they need to ask, and approaches every relationship with sound judgment and care. They are willing to roll up their sleeves, work through the details, and take ownership of whatever is needed to support clients and the broader team. No responsibility is viewed as too small when it contributes to an exceptional client experience. They thrive in a collaborative environment and take pride in providing thoughtful, highly personalized guidance.

Please contact Shari Cown with any interest or questions at shari@scconsultingsvcs.com