



## Position Description

Title: Family Office Advisor

Status: Full time

Date: December 1, 2012

Daintree Advisors is a multi-family office and wealth advisory firm founded in 2010. We guide and empower clients to “See the Forest,” so that they can make thoughtful financial decisions for themselves and their families.

## Job Summary

The Family Office Advisor provides superior service for Daintree Family Office clients, supporting Senior Client Advisors. The Family Office Advisor will serve as a point of contact for clients and their professional advisors, helping to lead the engagements. The long-term objective for this role is to grow into a Senior Client Advisor, with full client responsibility.

The Family Office Advisor will:

- Support Senior Client Advisors leading Family Office client engagements
- Deepen client relationships by understanding client situations, goals, and preferences
- Serve as point of contact for clients, coordinating service delivery with other members of the client team
- Participate in client investment and planning processes (estate planning, tax strategies for assets under management and portfolio management)
- Show diligence in maintaining all forms of client related communication and documentation
- Achieve high client satisfaction by listening to clients, helping them to “See the Forest,” and acting with efficiency, accuracy and integrity
- Provide training and supervision to client service staff

## Qualifications

The Family Office Advisor will possess the following qualifications:

- Minimum 3-7 years experience in investment management and/or financial advisory services, with a demonstrated ability to support client relationships
- Bachelor’s Degree from an accredited college or university
- CFP®, MBA, JD, CPA or other professional designation preferred
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as financial planning and securities balancing software
- Financial planning/wealth management experience



- Excellent communication and listening skills
- Client first attitude
- A team player, with strong coaching and leadership skills
- Desire/ability to work successfully in a small company environment

### Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary will be based on experience
- Benefits include dental, health care, 401(k)

Please send resume with cover letter to Brenda Reny at [brenda.reny@daintreadvisors.com](mailto:brenda.reny@daintreadvisors.com)

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