

TwinFocus | Senior Family Office Wealth Advisor

TwinFocus

TwinFocus is a Boston headquartered, dynamic and fast-growing multi-family office and investment advisory firm that was founded in 2006. We advise a select group of individuals, family office and institutions around the world on over \$7.5 billion in assets. Our firm delivers highly bespoke investment, financial and planning solutions for sophisticated and complex client situations. More information on TwinFocus can be found on our website: www.twinfocus.com.

Job Description

The Senior Family Office Wealth Advisor assists in managing complex client family office engagement by liaising with the firm's various business groups across the Client Advisory, Investment Research, and Portfolio Advisory teams to deliver a multidisciplinary solution. The candidate should have extensive wealth management experience, be able to work in a fast pace environment, and accustomed to delivering solutions to the exceptionally wealthy who demand outstanding service and client response times which may be outside of normal business hours.

To succeed, the candidate should also have proven ability to deliver on exceptional client service and acute attention to detail. As a wealth advisor to a family office client, you will be responsible for providing a continuum of care which spans beyond standard investment management and wealth advisory services. This role has a large component of relationship management, and our clients have an expectation of receiving a high level of service.

Primary Responsibilities

- Understand fundamentals of financial, tax, retirement and estate planning;
- Offer consultation on client's strategic asset allocation, portfolio structure design, report overview and performance monitoring;
- Proactively work with Advisory Service Associates and Portfolio Analysts internally to problem solve and troubleshoot as situations arise regarding portfolio client implementation, trading, servicing, and reporting;
- Prepare for client meetings, presentation, and conference calls (and provide timely follow-up materials), and oversee, monitor and manage the timely internal administration of client accounts and assets;
- Develop thoughtful and creative strategies that enhance client service delivery;
- Oversee and manage client servicing activities for a specific group of delegated clients including coordination of necessary client infrastructure documentation, presentation of investment policy guidelines and solutions, development of marketing materials (presentation construction),

portfolio trading, tax analysis, asset allocation/portfolio structuring analyses, and the implementation of investment and wealth structuring solutions;

- Spearhead and proactively recommend and coordinate portfolio rebalancing strategies (sometimes to meet client liquidity requirements), working with the firm's Portfolio Advisory and Investment Research teams to effectuate the investment decisions;
- Timely prepare client meeting and follow-up memoranda and other supporting reports/documents/ memoranda as required, within strict deadlines;
- Understand the firm's general performance reporting and Addepar efforts and be prepared to discuss with clients;
- Oversee and manage annual client tax reporting efforts and periodic tax reporting requests on an ad hoc basis. Work with portfolio analysts in overseeing firm's cost basis efforts;
- Assist with new client onboarding including the coordination of asset management and trust/custody relationships and the construction of reporting infrastructure, drafting Investment Policy Statements and implementation memoranda. In doing so, the Client Advisor works with the investment team and thinking through portfolio construction and full portfolio implementation, as well as client reporting requirements;
- Monitor client portfolios on an ongoing basis, including cash management and liquidity provisioning efforts to assure all portfolios are invested according to asset allocation models, fixed and custom. Factor and actively manage cash inflows from various sources (strategy redemptions, client cash infusions, etc.) and outflows (capital calls, cash liquidity needs, deployment into investment strategies, RMD's charitable giving, etc.);
- Proactively prepare timely client-ready draft emails on all portfolio and financial planning actions including updates; and
- Work with other firm personnel in preparing internal management memoranda and actively participate and make contributions to periodic firm management meetings.

Requirements

- 10+ years of experience in client service, wealth management, estate planning and/or tax planning;
- Ability to multi-task, manage projects within strict deadlines, work independently, demonstrate creativity, flexible to handle responsibilities beyond the core job, and be articulate;
- Ability to roll up the sleeves and delve into projects personally and proactively, with attention to detail;
- Strong commitment to teamwork, and be able to take instruction and guidance from the firm's Partners;
- Occasionally, a nontraditional work week will be necessary, inclusive of night and weekend work and be required when under tight deadline
- Solid organizational and communication skills as this position involves extensive writing;
- Passion for family office client service and attention to detail at all levels.
- Technology savvy and ability to handle industry software programs, Excel, Word, Excel, Addepar, Salesforce, MS Teams;
- At a minimum must have attained a bachelor's degree. Advanced degrees and/or certifications (CFP, MBA, CFA, CPA, JD, etc.) are strongly preferred but not required.

Applications

Interested candidates should send their resume to: careers@twinfocus.com