

## **TwinFocus – AI Automation Engineer**

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TwinFocus is a Boston-based, fast-growing, 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](http://www.twinfocus.com).

### **THE ROLE**

We are seeking a hands-on AI Automation Engineer to design, build, and deploy intelligent automation tools that support the day-to-day operations of a growing multi-family office. This role is focused on improving operational efficiency by automating manual administrative workflows, enhancing data accessibility, and helping teams work more effectively through practical AI solutions.

You will work directly with operations, client service, finance, and leadership teams to identify inefficiencies and transform manual processes into scalable, reliable systems. The ideal candidate is highly technical, execution focused, and passionate about building tools that solve real business problems.

This role is not centered on AI research or quantitative trading strategies. Instead, the focus is on operational automation, workflow orchestration, document intelligence, and enterprise AI enablement within a highly regulated environment.

The firm operates primarily within the Microsoft ecosystem, leveraging Azure, Microsoft Copilot, SharePoint, Teams, Power BI, and Power Automate, alongside core business systems including Wealthbox CRM, Asana, Addepar, and Microsoft Dynamics 365 Business Central.

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### **WHAT YOU WILL OWN**

- Design and deploy AI powered workflows that reduce manual administrative work across family office operations
- Automate operational processes related to money movement tracking, account opening workflows, tax preparation checklists, document routing, and client onboarding
- Build intelligent systems that organize, classify, summarize, and make historical firm documents searchable through LLM powered interfaces
- Develop integrations and workflow automations across Wealthbox CRM, Asana, SharePoint, Addepar, Microsoft Dynamics 365 Business Central, and other internal platforms
- Create internal AI tools that assist employees with document retrieval, memo drafting, task tracking, invoice processing, and operational reporting
- Automate recurring client communications, operational summaries, and internal reporting workflows
- Help establish centralized and searchable data structures that improve the firm's ability to retrieve institutional knowledge and historical records
- Identify opportunities for AI adoption and recommend new tools, system enhancements, and workflow improvements that support long term operational scalability
- Assist in expanding the firm's Microsoft based AI ecosystem using Azure, Copilot, Power Automate, Power BI, Teams, and SharePoint integrations

- Ensure all automation systems are secure, auditable, compliant, and designed with strong governance and human oversight

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## **WHAT WE ARE LOOKING FOR**

### Required

- 2–5 years of software engineering, automation engineering, or AI systems experience with strong Python proficiency
- Hands-on experience building with LLM APIs such as OpenAI, Anthropic, Azure OpenAI, or similar platforms
- Experience building AI powered workflows, automation systems, or internal operational tools in production environments
- Strong understanding of API integrations, workflow orchestration, and document processing pipelines
- Experience working with Microsoft technologies such as Azure, SharePoint, Teams, Power Automate, or Power BI
- Experience programmatically working with Excel, PDFs, CSVs, and operational datasets
- Strong communication skills with the ability to collaborate directly with non-technical business users
- Ability to independently identify inefficiencies and build practical solutions with minimal oversight
- Strong appreciation for security, auditability, and data governance in regulated environments

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### Preferred

- Experience with workflow automation frameworks, AI agent orchestration tools, or retrieval augmented generation (RAG) architectures
- Familiarity with systems such as Wealthbox, Addepar, Microsoft Dynamics 365 Business Central, or similar operational platforms
- Experience building enterprise search or knowledge management solutions powered by LLMs
- Exposure to OCR, document extraction, invoice processing, or records management systems
- Experience working in financial services, wealth management, family office, accounting, or other highly regulated industries
- Familiarity with SEC regulated environments, operational controls, and data privacy best practices
- Comfort working in a small, collaborative environment with significant ownership and autonomy

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## **WHAT SUCCESS LOOKS LIKE**

Within your first 30 days, you will have mapped core operational workflows and delivered your first production automation that reduces repetitive manual work.

Within 90 days, you will have deployed AI enabled workflows that improve operational efficiency around document management, task tracking, and administrative processes.

Within 6 months, you will have materially improved the firm's ability to automate family office operations, retrieve institutional knowledge, and securely leverage AI across internal systems and historical data repositories.