TwinFocus – Senior Associate, Family Office Management Team

Position Description

Title: Senior Associate, Family Office Management Team
Reports to: Managing Director of Family Office Management Team

Job Summary

As a member of the Family Office Management Team (FOMT), a Senior Associate is responsible for completing the day-to-day functional group work of the Family Office department. Team members are typically a non-client facing support function that facilitates day-to-day transactions for client portfolios including trade reconciliations, asset transfer, and account maintenance (i.e., retitling, account opening/termination, Practifi/CRM updates). Primary workload is derived from several service queues housed within Salesforce including but not limited to, Service Queue (Tasks), Money movement, Subscription document preparation, Tax payment Queues. The FOMT associate is directly involved in client meeting support, such as deliverable production. Associates also work closely with the Family Office Team to understand the client's needs and improve on service within each relationship.

Duties and Responsibilities

The position includes, but is not limited to:

- Daily service tasks include account opening, maintenance, as well as investment and transition paperwork. Tasks are managed through a workflow system by leveraging team distribution emails and direct actionable requests from the FOMT.
- Process client tax payments and the tax document lifecycle process
- Manage RMD process and payments
- Handle client shipments (FedEx, USPS, etc.,)
- Process capital calls and redemptions, and track distributions
- Process charitable gifting under direction of the client and FOMT
- Assist the FOMT with client meeting materials and storage of client materials on company network and/or document management software
- Ensure CRM data is up to date
- Assist client in completing firm and custodian paperwork, and subscription documents as needed
- Perform project work as necessary for firm-wide and team initiatives
- Support FOMT, as needed

Qualifications

A Senior Associate typically requires the following qualifications:

- BS/BA & a minimum of 8 years or related industry experience
- Knowledge of investment and financial planning concepts and broad understanding of capital markets
- Extensive knowledge of Salesforce/Practifi/CRM software
- Exceptional analytical and problem-solving proficiency
- Excellent written and verbal communication skills
- Highly organized and detail oriented, with a demonstrated ability to prioritize and proactively manage conflicting priorities while maintaining a high degree of accuracy and consistency
- Ability to learn quickly, adapt to unexpected issues and to work with others
- High degree of commitment and reliability
- Comfortable working in a fast-paced, dynamic, and highly entrepreneurial environment.