



JDJ Family Office Services Manager

COMPANY OVERVIEW - www.jdjfos.com

JDJ Family Office Services is an administrative multi-family office created in 2001 to serve affluent individuals and families. JDJ was founded on the premise that as wealth increases, so does the volume of day-to-day financial and administrative responsibilities. JDJ simplifies the lives of our clients by managing these responsibilities for them, offering a variety of high-end, confidential, customized, customer-focused services performed by professionals who have an expertise in both finance and administration.

Our services include personal accounting and net worth reporting; budgeting and cash flow planning; bill paying and expense reporting; tax planning coordination; investment and balance sheet administration; trust and estate administration; and lifestyle management.

JOB DESCRIPTION

We are currently seeking a qualified individual for the position of Manager to provide the following services:

- Provide accounting, tax coordination and planning, estate planning and implementation, financial management and business consulting services to multiple JDJ clients.
- Direct day-to-day accounting operations such as budgeting and cash flow management, as well as the full financial reporting process.
- Manage and lead internal client teams on multiple relationships to deliver services and complete special projects.
- Communicate proactively with advisors such as attorneys, tax accounts, wealth managers and insurance brokers on behalf of shared clients.
- Prepare Personal Financial Statements and other client deliverables.
- Oversee the accounts payable and payroll administration processes for multiple clients.
- Coordinate tax preparation and planning services with tax accountants.
- Assume responsibility for profitability of assigned client relationships (including reviewing hours charged to client, preparing client invoices, and reviewing current fees and recommending future fee structure).
- Implement client management policies and procedures including managing new client set up, establish client operating policies and procedures to ensure accurate reporting and cash management, and manage client contracts and renewals.
- Prepare an annual client service plan and manage execution of same.
- Complete special client projects of a complex nature.
- Supervise 3-5 staff members.
- Attend networking and marketing events as a representative of the company.

JOB REQUIREMENTS & QUALIFICATIONS

Due to the nature of the services performed and the clients served, in order to be considered for the position, the candidate must:

- Possess a BS/BA degree in Accounting or Finance.
- Minimum 7 years of experience in accounting and/or financial services.
- Have the ability to prepare and analyze financial statements.
- Have an understanding of Personal Financial Planning.
- Have a familiarity with the preparation of personal tax returns.
- Understand the basics of Estate Planning.
- Have direct client interaction experience.
- Strong attention to detail and the ability to multi-task, prioritize and delegate.
- Be a problem solver and a creative thinker.
- Able to independently handle special projects.
- Management and/or supervisory experience.
- Proficient with all Microsoft Office products, particularly Excel.
- Proficient with QuickBooks and Quicken or similar accounting software.
- Possess strong oral and written communication skills.
- Adhere to the highest confidentiality and fiduciary standards.
- Have a desire to participate in and contribute to the growth of a small private company.

In addition to the above requirements the following, are required:

- Advanced designation such as CFP or CPA
- Public accounting or administrative family office experience
- Personal Financial Planning experience

CONTACT

Submit resume, cover letter and salary requirements to hr@jdjfos.com. No phone calls, please.

EQUAL EMPLOYMENT OPPORTUNITY

JDJ is an equal opportunity employer. Qualified applicants are considered for employment without regard to age, race, color, sex, marital status, religion, creed, ancestry, national or ethnic origin, physical or mental disabilities (as defined in the Americans with Disabilities Act), sexual orientation, or gender identity.