



**Job Title:** Family Office Services Leader

**Department:** Consulting

**Reports to:** TBD

**Level:** Exempt; Flex Schedule at approximately 50% of FTE

**Location:** Louisville Metro

**Last updated:** 2021

### **Summary of Responsibilities:**

The Family Office Services Leader is the designated leader of the Family Office Service for MCM and Meritrust (MWM) and is responsible for service delivery, profitability, market growth, team strength and abilities and driving the vision of the service line. He or she is the liaison between the partners of MCM and MWM, the client, and the professional staff. He or she will also be assigned primary responsibility as the designated responsible relationship principal on multiple service engagement interacting with the MCM and MWM relationship partners.

### **Essential Functions:**

#### **Related to Leadership of Service Area:**

- Develop and execute an internal marketing plan for referrals from MCM or MWM partners or principals
- Plan, schedule, budget and staff engagements using firm resource, policies and procedures.
- Ensure that a high level of client satisfaction exists with all engagements; schedule personal followup with all clients at least annually.
- Develop collaboration and communication protocols and tools
- Maintain familiarity with qualifications of all designated team members; review team member assignments for qualifications and appropriateness.
- Review engagement letters for adherence to guideline economics and resource allocations to ensure service line profitability and planned investments for the future
- Ensure that adequate internal controls are in place for all engagements.
- Work to develop responsible, trained team members and complete timely performance evaluations.
- Monitor profitability of each client and initiate changes, if necessary
- Possess a complete knowledge of the firm's policies and procedures as well as the firm's philosophy for consulting methodology.
- Maintain knowledge of general economic and political trends of possible regulation or legislation that could affect the service line
- Set department and individual goals that support the vision of the service line
- Initiate annual budget with approval from MCM and MWM leadership and monitor for variances.
- Participate in MCM and MWM planning meetings as needed

**Kentucky**

**Indiana**

**Ohio**



**Related to Assigned Responsible Relationship Principal:**

- Maintain contact with assigned clients throughout the year; possess a thorough knowledge of the client and all facets of the client's engagement.
- Supervise team members and provide on-the-job training; review reports prepared by team members.
- Communicate progress of engagements, problems and resolutions to engagement team, client and MCM or MWM partner
- Anticipate problem areas of engagement and questions that will arise.

**Education, Experience, and Skills:**

- Bachelor's degree from an accredited college or university
- A minimum of 7 + years of experience in accounting, legal or financial services consulting
- Intermediate knowledge of Microsoft Office.
- Highly developed ability to deliver excellent client service
- Superior communication and negotiation skills

**Expectations:**

- Respect and earn the respect of fellow team members
- Take ownership of identified processes and responsibilities
- Keep open communications with client, manager, team and leadership
- Perform work with confidence and pride, follow through to completion
- Dependable
- Make informed decisions – discuss with manager when needed
- Grow and learn from past mistakes
- Work in a safe, clean and employee friendly atmosphere
- Work personal/professional development plan
- Must have flexibility with work schedule

**Working Conditions:**

- Minimal hazards
- General office working conditions
- Occasional heavy lifting
- Periodic evening and/or weekend work

By signing below I acknowledge I have read and reviewed this job description and understand my job responsibilities:

**Kentucky**

**Indiana**

**Ohio**



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Employee Signature and Date

EOE