

VIEWCREST ADVISORS

Director

Houston-area private family office

Position Description

Introduction:

Our client, a multi-generational family located in Asia, the US and Europe, with strong ties to the greater Houston area, seeks a Director to assist in building and delivering core services for its single-family office.

Core services for the family office initially include (1) a centralized information system, (2) G3 financial education program, (3) orchestration of family gatherings and events, (4) a family website and social media platform, and (5) archives for historical documents, artifacts and memorabilia.

The family office is based near Houston, Texas. The Director, in this newly-created role, should be available to attend on-site meetings and reside at the family compound during important family gatherings and events.

The Director will need to effectively connect with G1, G2 and G3 family members and exhibit utmost diplomacy in communications with family members and trusted advisors.

Detailed Responsibilities:

Family Information System

- Follow written protocols to implement and maintain the family's centralized information system; this new system, to be designed by a third-party provider, will serve as a secure portal for important family documents (from recommendations for advisors to the family tree to resources on topics of interest: philanthropy, etc.;
- Oversee detailed data entry into fields and maintain and evolve requisite processes and procedures, including but not limited to those which:
 - o Facilitate access to important documents by family members and their personal assistants located across the globe
 - o Ensure all important documents are captured in the system and are up-to-date
 - o Issue timely reminders to renew documents, permits, policies, and the like

G3 Financial Education Program

- Coordinate participation in the family's G3 financial education program (to be designed by a third-party provider)

Family Gatherings and Events

- Coordinate family gatherings and events of interest to each generation
- Interface with family members and their personal assistants as needed to organize logistics
- Reside on-site for important events

Family Website and Social Media Platform

- Oversee vendor selection and configuration
- Continuously monitor and make improvements to facilitate communication among the family members and address the needs of each generation

Family Archives

- Work with family members to identify and catalogue important historical documents, artifacts and memorabilia
- Facilitate use of the archives by family members to promote a deep understanding of and respect for family history

Communications

- Source and vet best-in-class providers for other family office services and maintain a directory of all such services and recommended third-party providers
- Connect effectively with G1, G2 and G3 family members with respect to their needs and expectations
- Exhibit utmost diplomacy and discretion in communications with family members and trusted advisors

Director's Qualifications:

Skills/Experience: The Director must bring strong operations and project management experience, ideally gained within a family-driven environment (family office, company, or professional services business) requiring bespoke, high quality service delivery. Notable accomplishments across as many as possible of the following will be valued:

- Identifying and leveraging technology tools and platforms that facilitate communications and productivity;
- Coordinating complex projects across multiple entities and stakeholders;
- Operating autonomously to advance key workstreams; and
- Building effective, streamlined processes.

Leadership characteristics:

- Succinct and precise communicator;
- Able to connect across generations and to build trusted relationships;
- Comfort operating within a multicultural environment;
- Presence and ease when engaging principals and advisors;
- Bias for action and the ability to deliver in a collaborative manner;
- Proactive, organized and disciplined problem-solver;
- Accessible, adaptable, diplomatic and flexible, with an unflappable attitude;
- An unflagging commitment to service, excellence, continuous improvement, and efficiency;
- Judgment, integrity and discretion.

Please share nominations or submit a resume and cover letter, in MS Word format, to Viewcrest Advisors at: familyofficeTX@viewcrestadvisors.com

Viewcrest Advisors is committed to social justice and access to opportunity; we actively cultivate relationships with leaders who have varied life experiences as well as the skills needed to lead strong, innovative organizations. Committed to your privacy and to protecting your personal data, please view our privacy policy on our website: www.viewcrestadvisors.com.