



# Position Specification

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Single Family Office  
Chief Operating Officer

Private and Confidential

## The Client

Our client is a well-established family office based in Miami, Florida. This growing family office serves three generations of family clients in the U.S. and abroad. The family, which has a long and rich history, created and operates an enduring enterprise of operating businesses that have achieved substantial success while remaining true to family values instilled through the generations. Founded in the 1970s, the family office serves the financial/accounting, tax, fiduciary, investment management, philanthropic, and administrative interests of this diverse group of clients and their related entities. The family office encompasses complex entity structures, sophisticated business and investment assets and complex tax strategies. The family shares a vision of unity and an enduring family office that supports family legacy for future generations.

The Chief Operating Officer ("COO") will report directly to the President of the family office, who is a third-generation family member. The COO will serve as a member of the family office Management Committee and will partner with them to determine the strategic vision and priorities for the family office. The COO will have primary responsibility for operations and business infrastructure, technology, legal, risk management, human resources, and property management/lifestyle management. The COO will also serve as a trusted advisor to the family as a whole and to individual family members, providing them with advice and counsel to assist them in making informed decisions and advancing and accomplishing family long-term objectives.

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## The Opportunity

The family office is at a strategic inflection point driven by increased scale, complexity, multigenerational engagement, and geographic breadth. This role is being created to bring institutional rigor, integration, and leadership to support governance, family harmony, and the family's long-term objectives. This position offers a distinctive opportunity for an experienced bilingual (English and Spanish), family office/wealth management professional with a broad knowledge across the disciplines of wealth management, to assume responsibility for the day-to-day operations of this multigenerational family office.

The COO will have a thorough understanding of family office services, operations and best practices and will be responsible for transforming and overseeing the family office infrastructure and operations of the family office to become an institutional quality platform. The ideal candidate will have sound business acumen combined with the leadership and relationship management skills that will instill the confidence and credibility needed to become a trusted advisor to the family.

**Location:** Miami, Florida

**Reports to:** Family Office President, a third-generation family member

# The Position

Key responsibilities include:

❖ **Strategic Planning, Operations and Execution**

- Partner with the Management Committee to develop the strategic vision and goals for the family office.
- Determine the scope of services to be provided by the family office directly and those to be executed and coordinated through outside providers.
- Identify, prioritize, and execute strategic projects and initiatives to advance the organization's value, vision and culture.
- Ensure high quality and timely service delivery to family clients and related family entities.

❖ **Infrastructure & Operations**

- Review, enhance and implement governance practices, technology, systems, and operational policies, procedures, and controls to ensure the effective and efficient operation of the family office, with a focus on continuous improvement.
- Design and build a professional, organized institutional quality business environment.
- Continually assess and improve office operations.
- Establish operational metrics to measure performance.

❖ **Team Leadership**

- In concert with the Management Committee, determine family office human capital needs.
- Hire, develop, and motivate staff.
- Provide vision, direction and leadership of a client-focused culture focused on excellence.
- Foster a high performance, collaborative culture. Promote transparency, respect, honesty, integrity, and teamwork that encourages long-term commitment by staff.

❖ **Technology & Security**

- Establish and oversee the information security environment, including cyber security, data security and networks to ensure protections are in place for confidential family information.
- Automate and leverage technology to optimize the effectiveness and efficiency of family office functions and operations.

❖ **Legal**

- Evaluate and oversee the best legal providers given the needs of the family.
- Facilitate the review, evaluation, and negotiation of personal, business, and investment contracts for the family office and family entities (leases, licenses, employment agreements, service contracts, account agreements, LP agreements, vendor agreements, non-disclosure agreements, etc.).

- ❖ **Risk Management**
  - Identify strategic risk management opportunities.
  - Interface with risk management professionals.
- ❖ **Client Relationship Management & Interaction**
  - **Trusted Advisor Role**
    - Build credibility and relationships with all family clients. Assume critical senior advisor and client service role.
    - Establish and maintain strong communication and relationships with family members.
    - Provide advice and counsel to family clients and serve as a sounding board and strategic thinking partner in making well-informed decisions.
  - **Communication & Transparency**
    - Promote open/transparent lines of communication with family members, internal staff and external service providers. Effectively listen to all family perspectives on multigenerational issues, fostering an environment of mutual respect, collaboration, harmony and unity.
    - Translate and communicate complex financial, business, investment, and other relevant concepts in a straightforward, concise, and easy to understand manner utilizing a consultative approach that allows family members to focus on strategic and personal priorities without operational burden.
- ❖ **External Professional Representation, Communication & Oversight**
  - **Advisor & Provider Management**
    - Develop and facilitate relationships with all current and future external advisors and service providers.
    - Coordinate strategies and monitor fees, commitments, agreements and advisor/provider performance.
    - Streamline and manage information, questions, meetings, and other requests that need to be addressed.
    - Serve as advocate to the family on all matters.
    - Develop and maintain appropriate relationships with key operating company personnel to facilitate the communication of relevant information.
    - Represent the family to all internal and external constituencies in a highly professional, confidential, and ethical manner.

# The Ideal Candidate

The ideal background will include:

## ❖ **Qualifications & Experience**

- Undergraduate degree required. Advanced degree preferred (i.e., JD, MBA).
- Minimum of 15 years of relevant professional experience, including experience working in the family office/wealth management industry.
- Native language fluency in both English and Spanish. Strong cultural intelligence. Experience working with multi-cultural, cross-border operations. Comfortable operating across jurisdictions and family dynamics.
- Prior experience working with/advising multigenerational families/family office clients of significant wealth with highly sophisticated and complex operating business and investment structures. Highly proactive approach to serving client needs. Knowledgeable about family office best practices.
- Proven track record of success as a COO and in delivering quality results.
- Adept at advising family clients on business, financial, and investment matters and in assessing risks and opportunities to enable them to make informed decisions.
- Experience serving as an advocate for family clients with all external advisors, providers, and other constituencies.

## ❖ **Skills & Knowledge**

### ○ **Technical Expertise**

- Knowledgeable about all areas of wealth management (finance, accounting, tax, investment management, trust and estate planning, and administration, philanthropy, legal and risk management, etc.).
- Technologically savvy. Proficient with family office technology solutions, financial reporting systems and cybersecurity protocols.

## ❖ **Operational Excellence**

- Proven track record of success in business infrastructure, operations design and management, including creating operational efficiencies through technology and organizational structures.
- Strong leadership, management and mentoring skills. Demonstrated experience in attracting and retaining top talent.
- Disciplined and process-oriented approach. Track record of success in project management, problem-solving and counseling/advising family clients.
- Demonstrated ability to create value through operational excellence, efficiencies and continuous improvement.
- Solutions-focused with high sense of urgency.
- Thrives in a changing growth environment, including reprioritization or reassignment of responsibilities.

**❖ Communication & Relationship Building**

- Excellent verbal, written communication skills and listening skills with the ability to adapt to a diverse audience and translate complex data into clear, concise advice to facilitate strategic decision making.
- Able to provide objective advice and recommendations with conviction. Able to confidently express opinions and recommendations to support optimal solutions in the best interest of the family.
- Builds trusted relationships across multiple generations of family clients.
- Diplomatic, professional, tactful, and pragmatic in all interactions.

**❖ Leadership & Values****○ Leadership Style**

- High energy. Proactive yet flexible leader with a “roll up your sleeves” approach and mentality.
- Collaborative, team player with high EQ combined with high IQ. Continuous learner.
- Accountable. Consistently delivers on commitments.
- Healthy balance of confidence, conviction and humility.
- Accessible and approachable; builds rapport with all family members and staff.
- Exercises sound judgment and common sense. Demonstrated decision-making skills. Comfortable balancing needs, objectives and priorities and executing decisions

**○ Strategic Capabilities**

- Expert generalist and tactical manager who anticipates issues and implements solutions.
- Detail-oriented while maintaining big-picture perspective. Balances strategic thinking with practical execution.

**○ Professional Presence**

- Client-service oriented with a results-driven approach.
- Dynamic, engaging, and highly motivated self-starter.
- Exhibits presence, polish, and professionalism to represent the family effectively.
- Flexible and adaptable. Highly responsive to client needs.

**○ Character & Integrity**

- Utmost integrity, discretion, and trustworthiness with sensitive and confidential information.
- Strong work ethic combined with a down-to-earth approach.
- No personal agenda; puts family interests first; no ego.
- Maintains composure under pressure; even-keeled, patient, and calm.

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## Compensation

An industry-competitive package will be offered, including comprehensive benefits.

## Contacts

### **Brian C. Adams**

President

615-339-7887 (mobile)

[badams@mackinternational.com](mailto:badams@mackinternational.com)

### **Linda C. Mack**

Founder

312-953-7809 (mobile)

[lmack@mackinternational.com](mailto:lmack@mackinternational.com)

### **Jill E. Hendrickson**

Consultant

312-878-7101 (office)

[jhendrickson@mackinternational.com](mailto:jhendrickson@mackinternational.com)