Position Specification

Single Family Office
President

Private and Confidential

The Client

Our client is a newly established family office based in Cincinnati, Ohio. The family office serves the founder (“Principal”) of a highly successful, privately held company. The primary mission of the office is to serve the personal, financial/accounting, reporting, tax, investment management, fiduciary, philanthropic, and administrative interests of this Principal and their related entities.

The President will report directly to the Principal and will partner with him to determine the strategic vision and priorities for the family office today and in the future. The President will lead the family office and support the Principal in making informed decisions which will preserve and grow his wealth and leverage his time, allowing him to focus on his individual, family, and philanthropic initiatives.

The Opportunity

This position offers a distinctive opportunity for an experienced family office/wealth management executive with excellent strategic capabilities, strong investment, financial and business acumen and a broad knowledge across the disciplines of wealth management to lead strategic and day-to-day operations and ensure the seamless delivery of services for this newly established family office. The successful candidate will have experience working with substantial, multigenerational families and a thorough understanding of family office services, operations, and best practices.

Location: Cincinnati, Ohio

Reports to: First-generation family Principal

The Position

Key responsibilities include:

- **Strategic Planning & Execution**
  - Partner with the Principal to establish priorities and implement the strategic vision and goals for the family office, including the creation of the mission, vision, value statement and supporting business plan.
  - Ensure high quality service delivery to family clients and related family entities.
  - Build a best-in-class family office infrastructure based on optimal strategies for services to be delivered to the Principal.
  - Oversee and collaborate with all external advisors to serve the Principal.

  Investment Strategy & Oversight
  - Develop an understanding of all aspects of the portfolio, including investment partners and managers and their respective strategies and risk profiles.
  - Partner with the Principal to review and refine investment policy and strategy in support of their objectives and risk profile.
  - Oversee the implementation of investment strategies within the portfolio, including public, private, fund vehicles and other alternative and direct private equity investments.
  - Assess, evaluate and oversee direct private equity investments on an ongoing basis; utilize hands-on investment/business skills including financial/quantitative analysis and investment negotiation/documentation.

- Lead direct private equity investing including sourcing, research, due diligence, portfolio construction and ongoing monitoring.
- Develop and enhance relationships with other family offices and top-tier private equity managers and general partners to generate co-investment opportunities.
- Monitor, review and evaluate investment allocations, and performance to ensure alignment with policies, objectives, and risk tolerance.
- Make recommendations for changes as appropriate.

Financial Systems & Reporting
- Implement and oversee appropriate financial/accounting processes, systems, databases, and reporting infrastructure to track all assets and entities.

Tax Planning & Compliance
- Oversee tax preparation, filing, and compliance for all entities.
- Monitor financial and tax planning strategies for all entities. Proactively work with appropriate external accounting, tax, trust/estate planning and legal advisors to advise clients on planning techniques and to identify, develop and maintain optimal tax and wealth transfer strategies for the family. Ensure the family office and its clients are in compliance with applicable regulations and tax laws.
- Coordinate trust and estate planning with internal and external advisors to develop and maintain optimal tax and wealth strategies, including the design, structure, implementation, and administration of trusts and estate plans.

Contract Review & Legal Coordination
- 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, etc.).
- Coordinate legal work performed by outside counsel.

Risk Management
- Oversee comprehensive risk management for the Principal and family office, including identification and mitigation of operational, financial, and reputational risks related to the family's assets and business interests.
- Recommend and implement appropriate insurance, security, and risk mitigation strategies.

❖ **Operational & Executive Leadership**

Infrastructure & Operations
- Implement governance practices, technology, systems, and operational policies, procedures, and controls to ensure the effective and efficient operation, with a focus on continuous improvement.
- Establish operational metrics to measure performance.

Security & Technology
- Establish and oversee the information security environment, including data security and networks to ensure protections are in place for confidential family information.
- Leverage technology to optimize family office functions.

Team Leadership
- In concert with the Principal, determine family office human capital needs.
- Hire, develop, mentor and motivate staff to provide exceptional service.

- Provide vision, direction and leadership of client-focused culture focused on collaboration and excellence.
- Foster an environment of transparency, respect, honesty, integrity, and teamwork that encourages long-term commitment by staff.

❖ **External Advisor 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, enabling the Principal to focus his time and energy on his priorities.
- Serve as advocate to the Principal on all matters.

Industry Engagement & Best Practices
- Build relationships with peers and thought leaders in the market.
- Identify, inform, and advise the Principal on industry developments, trends, benchmarks and best practices, including governance structures, next generation family education and engagement

Professional Representation
- Develop and maintain appropriate relationships with key operating business 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.

❖ **Client Relationship Management & Interaction**

Trusted Advisor Role
- Establish and maintain strong communication and relationships with family members.
- Build credibility as a trusted advisor to the Principal and family members.
- Provide advice and counsel to the Principal and family.
- Serve as a sounding board and strategic thinking partner in making well-informed decisions.

Communication & Transparency
- Promote open and transparent lines of communication with internal staff and external service providers and listen to all perspectives.
- Facilitate discourse and advocate solutions that are objective and balanced.
- Synthesize, present, and communicate complex financial, business, investment, and other relevant concepts in a straightforward, concise, and easy to understand manner, utilizing a consultative approach.

The Ideal Candidate

The ideal candidate will demonstrate strong relationship management and advisory skills and will instill the confidence and credibility needed to become a senior trusted advisor for all family members, including future generations.

❖ Qualifications & Experience:

- Undergraduate degree required. Advanced degree (i.e., JD, MBA) or relevant certifications (i.e., CPA, CFA) preferred.
- Minimum of 15+ years of experience in the family office/wealth management industry.
- Experienced in building/leading a family office professional services platform with a distinctive value proposition.
- Adept at advising family clients on investment, financial, and business matters and in assessing risks and opportunities to enable the Principal to make informed decisions.
- Business operations management experience combined with a track record of success in managing multiple projects.
- Experience serving as an advocate for family with all external advisors, providers, and other constituencies.

❖ Leadership & Values

Character & Integrity
- Demonstrates utmost integrity, discretion, and trustworthiness with sensitive and confidential information.
- Exhibits humility with no personal agenda; puts family interests first; no ego.
- Maintains composure under pressure; even-keeled, patient, and calm.

Leadership Style
- Provides strategic leadership, management, and mentoring with high emotional intelligence.
- Accessible and approachable; builds rapport with all family members and staff.
- Collaborative team player with a "roll-up-your-sleeves" mentality.
- Exercises sound judgment and common sense in decision-making.

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 Principal effectively.
- Strong work ethic balanced with flexibility and adaptability.

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

❖ Skills & Knowledge

Technical Expertise
- Comprehensive knowledge of wealth management domains: tax, accounting, finance, trust and estate planning, investment management, insurance, risk management, and philanthropy.
- Relevant investment management experience. Experience should include all aspects of the investment process, including investment strategy and policy, asset allocation, due diligence, multi-asset class direct investment and manager/strategy selection, portfolio construction, ongoing portfolio monitoring, management and performance analytics for individuals, partnerships, trusts and other entities.
- Knowledge across all traditional and alternative asset classes with specific experience in direct private equity.
- Strong quantitative and analytical skills including structuring and negotiating the terms and details of the investment and advisory relationship; able to quickly grasp and evaluate complex investment strategies.

- Proficient with family office technology solutions, financial reporting systems, and cybersecurity protocols.

Operational Excellence
- Disciplined and process-oriented approach.
- Solutions-focused with high sense of urgency.
- Demonstrates initiative and anticipates client needs proactively.

Communication & Relationship Building
- Translates complex data into clear, concise advice to facilitate strategic decision-making.
- Builds trusted relationships across multiple generations.
- Diplomatic, tactful, and pragmatic in all interactions.
- Adapts communication style to diverse audiences.
- Flexibility and resilience to thrive in a fast-paced, growth-oriented environment with shifting priorities.
- Collaborative.

Compensation

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

Contacts

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