Position Available

Managing Director, CFO Services

Denver, CO

We have been retained by a client who is seeking a Managing Director, CFO Services for their new regional office in Denver, CO. The firm was co-founded by two prominent wealth management and investment principals who joined their private family offices. This is an exceptional early-stage opportunity with an independent privately-held firm whose executive leadership is among the most recognized in the industry.

The Managing Director, CFO Services (MDCFOS) will be part of a regional family office team. The MDCFOS will serve as the clients' chief family financial officer and manage client business, family office and personal financial data. He or she will be responsible for a critical discipline as a member of a dynamic team that offers a holistic wealth management/family office platform delivery. The MDCFOS will provide comprehensive financial management and planning services including: financial oversight, risk management, customized net worth and cash flow reporting, and tax reporting coordination.

A CPA is highly recommended and the ideal candidate will have prior accounting and CFO experience within a family-owned business or a family office, or worked with clients who fit that profile. The ideal candidate must be able to review income tax planning and compliance for HNW individuals, trusts, closely-held businesses, and pass-through entities. He or she should have general knowledge of estate/gift planning, wealth transfer strategies, and charitable planning strategies.

The MDCFOS will help grow the UHNW family office practice in the region by contributing to new client development. The MDCFOS will be part of a highly collaborative multidisciplinary regional team and participate in a team-based compensation program. Cultural fit is as important as investment qualifications. The MDCFO will work in a collegial team environment that focuses on impeccable client service delivery and demonstrate "confidence, not arrogance".

Minimum Qualifications:

- 15+ years' experience within family office, family owned business, wealth management/financial planning firm, public accounting firm or other relevant experience working with UHNW clients
- Bachelor's degree; related Master's degree preferred; CPA highly preferred; other professional designations recommended (CFP, CFA, JD, etc.).
- Ability to create, analyze and review financial documents, including income statements, balance sheets and tax returns
- Proficiency in general ledger accounting and related software systems; advanced MS Excel skills.
- Experience with an investment portfolio data aggregation and reporting platform preferred.
- Comfortable navigation of the entities typically used for planning purposes, including Partnerships, Trusts, Limited Liability Corporations, C & S Corporations, etc.
- Ability to analyze and provide solutions relative to income, gift and estate tax planning
- Highly developed soft skills necessary to work intimately with families on highly sensitive, complex and confidential matters

To apply, please submit your resume to jeannie@braysearch.com. For more information for qualified candidates, please call Buzz Bray at (206) 402-3401. Inquiries and applications will be held in strict confidence.