MANAGER, CLIENT ADVISORY TEAM

Bray Executive Search, LLC is a national executive search firm specializing in family wealth management. Our client is a private, multi-family office (MFO) that serves a select group of clients with substantial wealth and is based in Dallas, TX. The firm will consider relocation benefits for an exceptional candidate.

This firm is a successful and nationally-known MFO serving families of significant wealth. The wide range of wealth management services they provide help simplify their clients' financial needs and express their family values. The firm offers full family office and wealth management services including: comprehensive planning, investment management, financial and tax management, trust administration, philanthropy, private banking, and multi-generational consulting including governance, education, and legacy planning.

The Manager will profile prospects and clients regarding their values, needs and goals as well as provide an extraordinarily high level of service. The primary role is serving as project manager for client engagements with an emphasis on managing the flow of all projects for assigned clients to a successful completion. This role will oversee, manage, prepare, analyze and provide advice to wealthy families on all aspects of personal financial planning. It is important that candidates have the insight and skills to optimize an industry-leading platform and service model that serve the unique needs of highly complex family clients.

Candidates must have at least 5-10 years of experience working with HNW family clients and an advanced degree and/or professional designation is preferable. Candidates should have a planning or consultative background and have worked with HNW/UHNW clients providing a holistic scope of services in a multi-generational context. It is essential that candidates be a seamless cultural fit as this firm prides itself on its highly collaborative, team-based collegial culture. The firm provides continuing training and career development to enhance IQ and EQ for all advisors who work with clients.

Qualifications:

- Bachelor's degree required; graduate or professional studies preferred including MBA, JD, LLM, CPA, CFP, CFA, CIMA, or CPWA, etc.
- Minimum 5-10 years of wealth advisory to HNW/UHNW family clients.
- Extensive experience working with family clients of significant wealth and manage optimize integrated solutions across wealth management disciplines, to serve complex client families.
- Ability to thrive in a highly collaborative, team-based collegial culture with peers who are highly educated and experienced with this market segment.
- Ability to mentor, train, and develop less experienced team members into future client advisors.
- Demonstrated unwavering integrity and meticulous attention to details.

Please submit your resume to jeannie@braysearch.com. Candidates who meet the criteria may call Buzz Bray at 206-402-3401. All inquiries will be held in the strictest of confidence.