

MANAGING DIRECTOR

Miami, FL

Bray Executive Search is a national executive search firm specializing in private wealth management. We have been retained by a prominent Multifamily Office that is seeking a Managing Director for their office in Miami, FL.

This is a rare executive leadership opportunity with a leading, nationally-known MFO. This firm exclusively serves UHNW family clients with a platform and business model for the UHNW client segment that allows for highly customized solutions. The firm provides an encompassing, holistic scope of wealth management services including investment management (including private investing), estate, tax, and legacy planning, governance, customized multi-generational family education, philanthropy, trust and fiduciary services, and financial management.

The MD should be an experienced Wealth Advisor, have a known and established presence in the South Florida market, and have proven expertise serving UHNW clients. MDs with this firm are not “only” managers—they are also wealth advisors, and the candidate must be willing to work with clients in addition to leadership responsibilities. He/she should have a demonstrated record of successful client development and engagement and should be willing to spend some of their time in new client development as part of their leadership role. The Miami team includes professionals serving UHNW clients in Latin America (as well as the US), although experience with Latin American clients is not necessarily a requirement for this role. However, a deep understanding and consultative orientation with UHNW is indispensable, along with the ability to lead and mentor others.

This is a prestigious opportunity, and the rewards will be excellent for the person who is hired. The ideal candidate will be a seamless cultural fit in a collaborative, collegial firm of high-achieving and conscientious professionals. This firm has had very little turnover (on a national basis) due in large part to its culture, and an excellent record for taking great care of their people.

Requirements:

- BA required; highly prefer graduate or professional studies, or certifications
- Minimum 15+ years of Leadership and Wealth Advisory to HNW/UHNW family clients
- Experience/expertise in multigenerational family client advisory
- Known and expert external presence with established centers-of-influence in South Florida
- Able to win and/or bring new UHNW family client business
- Knowledge of solutions across wealth management disciplines
- Able to contribute thought leadership on a regional and national basis

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