WEALTH STRATEGIST- FAMILY OFFICE CLIENTS (AUSTIN, TX)

Bray Executive Search is a national executive search firm specializing in wealth management for ultra-affluent family clients. We have been retained by an independent RIA seeking a Wealth Strategist for their office in Austin, TX.

This fast-growing, independent firm has gained national recognition as a leading MFO/RIA for those of significant wealth. They have a platform and business model for the HNW/UHNW client segment that provides customized solutions for the entire family enterprise. The firm provides an encompassing, holistic scope of family office services for HNW/UHNW clients. Comprehensive planning services include estate, tax, and legacy, philanthropy and private foundation services, trust and fiduciary advisory, family governance, and state-of-the-industry multi-generational family education offerings, as well as investment management (including private) and household financial management.

The Wealth Strategist will work in partnership with a senior team leader who is a recognized thought leader and expert in multi-generational education, as well as a known expert in planning, trust and tax and governance across the family enterprise. The Wealth Strategist will have client-facing responsibilities and receive mentorship on all aspects of family meetings facilitation, navigating family dynamics, and implementing strategic legacy planning for the firm's ultra-affluent clients; and will be a key part of a collaborative client-centric culture across the firm.

Candidates must have a JD, LLM preferred (though not required), and at least 3-7 years of work experience in estate planning, tax and trusts. The ideal candidate has law firm experience in conducting research and drafting documents and is seeking a career opportunity to work in a holistic and consultative multi-generational context with UHNW families, along with the personal satisfaction that comes with professional work/life balance.

All communication will be held in the strictest confidence, and we will be glad to have a confidential conversation and share details with a qualified candidate. The firm will discuss relocation for the highly qualified candidate, and there is a possibility for some remote work if the person lives in the region. The successful candidate should be able to understand and communicate solutions to complex financial issues and collaborate with the firm's in-house resources for investment management and other wealth management services. A collegial, high-EQ person would be the right cultural fit for this firm.

Requirements:

- JD required; LLM preferred
- Minimum 3-7 years in Estate Planning, Trust, and Tax
- Legal research and drafting experience at a law firm
- Willingness to work holistically across the family enterprise, especially education for next-gen

Please submit your resume to jeannie@braysearch.com. All inquiries and applications will be held in strict confidence.