



POSITION AND CANDIDATE SPECIFICATION

CONFIDENTIAL SINGLE FAMILY OFFICE

CHIEF FINANCIAL OFFICER

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Assignment:



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POSITION SPECIFICATION

Client Organization

The client is a New York City-based single family office, the Principal of which is one of the founders of a large, sophisticated and well-known financial services business. Total assets are in the \$5-\$6 billion range, and these have historically been very concentrated in the holdings of the original financial services business (but the holdings will diversify with time).

The office employs roughly 10 individuals, and while the organization has existed for some time, a new President/CEO of the organization, a longtime friend and advisor to the Principal, is overseeing the creation of a newer incarnation of the organization, with a slightly more structured and professional culture taking shape. The firm is also readying for the build out an investment organization as assets/holdings diversify.

The Principal is a first-generation wealth creator with four children in their twenties, so some generational transfer will occur in the coming years.

Position Summary and Candidate Profile

The client is looking for a Chief Financial Officer who has, preferably, had very senior (CFO) financial experience in a family office with complex private holdings and sophisticated trusts and estates planning. This person will also have robust experience in financial reporting and creating and using accounting systems and attendant reporting.

Experience with planes and boats, both from an ownership and chartering perspective is also important as is experience with real estate purchase and construction, HR and IT. In addition, multi-generational experience will be helpful but not required as will be experience with foundations. Finally, as the family makes more private investments, partnership, LLC and corporate accounting and investment structuring is also important.

This person should be a hard worker, a good manager and an excellent communicator. He or she should be fully conversant with tax issues and tax accounting but need not be an expert in these areas as there are experts in-house and outside.

This position will be based in New York and will report to the President/CEO of the family office, who in turn reports to the Principal.