

Park City Family Office (parkcityfamilyoffice.com) is a multi-family office located in Park City, Utah. Our multi-family office consults with entrepreneurial families; aligning and overseeing wealth management, tax, estate planning, generational wealth transfer, and family governance.

The **Administrative Leader** is a professional who has an overall understanding of a Managing Director's day-to-day responsibilities while working with a proactive, leadership spirit. The administrative leader position requires a high degree of multi-tasking and ability to work under pressure in a fast-paced environment. The administrative leader will represent Park City Family Office & its managing directors in a positive light through great follow-through skills and sound judgment. The Administrative Leader position will support the Managing Directors and families of Park City Family Office. This role requires a high level of discretion, sound judgement, and the ability to work with highly confidential information.

Core Responsibility

Client request, execution, documentation

Interacting with client families in all facets of daily needs

Team scheduling and calendar ownership

Strategic coordination with Internal and external partners

Support sales with database, notes, systems

Essential Duties & Task

- Proactively provide support in coordinating day-to-day business activities.
- Maintain calendar and schedules. Proactively manage the calendar months out. Remove all schedule conflicts and resolve timely.
- Take notes and track follow-ups for client meetings, and internal staff meetings.
- Compose and format documentation including PowerPoint presentations, Excel spreadsheets, letters, and communication to clients.
- Developing and maintaining good working relationships throughout the organization by exhibiting outstanding customer service skills with all clients, internal & external partners.
- Collect agenda items, take minutes for important business meetings, note action items and follow up as needed.
- Coordinate meetings and schedule conference rooms. Arrange conference calls and video conference meetings.
- Prepare, review, and track client reports and meeting preparation timely.
- Assist with Client Onboarding process and ongoing Client Maintenance requirements
- Provide technical support or partner with IT on behalf of the Managing Directors as needed
- Screen incoming telephone calls. Return voicemails
- Proactively seek ways to improve administrative and operational processes
- Attend and participate in Leadership meetings.

- Provide support to other team members as needed.
- Perform other incidental and related duties as required.
- Order supplies and product as necessary and maintaining supply records for invoicing.
- Create and produce reports as well as databases while establishing and maintaining files and record to support sales efforts

Educational/Previous Experience Requirements:

- Two years' client support in wealth management preferred, or equivalent demonstrated through a combination work experience

Licenses/Certifications:

- Series 65 or 66 preferred

What we expect you already know:

- Excellent organizational, communication and grammatical skills with a strong attention to detail required.
- Excellent planning, scheduling and problem-solving skills.
- Must be able to work professionally with flexibility in handling multiple priorities in a fast-paced environment
- Advanced typing and computer skills are required including a solid knowledge of word processing, spreadsheet, presentation, and desktop publishing.
- Strong PC skills and knowledge of MS Word, Excel and PowerPoint are required.

We expect our associates at all levels to:

- Grow professionally and inspire others to do the same
- Work with others to achieve desired outcomes
- Make prompt, pragmatic choices and act with the client in mind
- Take ownership and hold themselves and others accountable for delivering results that matter
- Contribute to the continuous evolution of the firm
- Have an entrepreneurial mindset

Pay Range

\$45,000 - \$55,000 Depending on Experience

Location

Team is based in Park City, Utah. This position is meant for remote work. Occasional travel is requested (1-2x year maximum).