Matthias

LEGAL | CONSULTING | MULTI-FAMILY OFFICE

MATTHIAS PRIVATE WEALTH

Matthias Private Wealth (MPW) is an integrated, comprehensive multi-family office founded to serve the diverse wealth management, accounting, legal, real estate and business needs of its founding family. MPW is affiliated with the Matthias & Matthias, PL law firm founded nearly 50 years ago and MPW Consulting, a business consulting firm. Today, those services extend to other UHNW families that have uniquely administered assets, including real estate, closely held businesses and trusts. MPW has a unique culture and professional depth due to its origin. The team of attorneys, tax specialists, accountants, financial planners, and business consultants understands the strategic power of aggregating this collective professional knowledge under one roof – a single source solution and advocate.

We consider our work virtuous because of the character of our clients, the culture of our office and the unique impact we effectuate. Our clients partner with our team. Our client relationships are rewarding and meaningful, typically lasting across multiple generations. Our long-term plan is to protect our culture and build our team with succession to serve future client generations.

FAMILY WEALTH ADVISOR: JOB DESCRIPTION & RESPONSIBLITIES

As a Family Wealth Advisor you will be required to grow your depth of knowledge across the firm's service areas, so that you are able to provide strategic integrated solutions. You will be expected to earn and keep our clients' trust. You will be expected to put the client family's goals and objectives first and ensure that the family's best interests are being reasonably met by providing a range of integrated wealth management services. You must have creative problem-solving skills. The responsibilities of a Family Wealth Advisor include, but are not limited to:

- Serve as a lead advisor for select clients. This involves developing and overseeing an integrated strategy for investments, tax, estate planning, trusts, insurance, legacy and succession and philanthropy for each client family.
- Develop and deliver comprehensive solutions across an array of investment and planning disciplines.
- Review consolidated quarterly investment reports and personal financial statements.
- Review and monitor tax returns and estate planning documents to ensure they fit each individual client's current circumstances and future goals.
- Prepare, monitor and ensure accuracy of financial reports including budgets and cash flow projections as requested by clients.
- Coordinate communication and services among the client's teams of internal and external advisors including attorneys, accountants, and other services providers.
- Serve as an ambassador of the firm which will support new client relationship development opportunities.
- Assist in the accounting, bill paying, lifestyle management needs when appropriate.
- Mentor and develop less experienced team members.
- Maintain data in Salesforce and other relevant platforms for wealth management.

QUALIFICATIONS

Successful candidates should possess the following skills and abilities:

- Ability to work collaboratively with other members of the client service team to deliver the appropriate integrated solutions to clients
- Evidence of experience leading client meetings independently
- Broad understanding of client service delivery for UHNW clients across multiple disciplines
- Outstanding written and oral communications skills
- High attention to accuracy, thoroughness, and execution
- Ability to exercise absolute discretion and display strong judgement on all client matters
- Strong work ethic
- Excellent project management skills
- Strong attention to detail and exceptional problem-solving skills
- Computer proficiency (including Microsoft Office, financial planning software, tax planning and CRM systems)

EXPERIENCE

- Bachelor's degree required
- An advanced degree (JD or MBA, in particular) and a CFP, CPA, CPWA or other professional designations are highly desirable
- Minimum of 8 years of related wealth management experience providing services to HNW and UHNW individuals and families
- 3+ years of experience leading client meetings with HNW and UHNW families

COMPENSATION

Compensation is competitive based on the candidate's experience. Bonus structure and benefits to include employer paid health insurance and 401(k). Vacation and paid time off per firm policy. Candidate will be encouraged to participate in a variety of professional development training opportunities such as public speaking, financial planning, custodial processes, compliance, tax planning and others.