Family Office Client Manager

Company: SIG Family Office
Location: Las Vegas, Nevada
Job Type: Full-Time

Position Overview

The Client Manager is the primary relationship lead for ultra-high-net-worth families—owning the wealth plan, orchestrating investments/tax/estate/trust deliverables, and ensuring an exceptional experience. This seat aligns family objectives with a clear strategy, consistent execution, and a proactive communication rhythm.

Seat Summary

- **Core Purpose:** Deliver a trusted, white-glove experience that achieves each family's strategic objectives.
- **Reports To:** President Family Office
- **Direct Reports:** Associates/Analysts (as staffed)
- **Key Interfaces:** Investments, Tax/Trust, Operations, Legal/External Advisors, Philanthropy

Top 5 Accountabilities

1. **Relationship Ownership & Strategy:** Single-threaded owner of Client's objectives, plan, and satisfaction.
2. **Wealth Plan Orchestration:** IPS, asset allocation, tax/estate coordination, insurance, liquidity, and risk.
3. **Cadence & Communication:** Quarterly family meetings, on-time reporting, clear action tracking.
4. **Execution Quality:** Drive tasks to done across internal/external teams; no dropped balls.
5. **Compliance & Documentation:** File completeness, meeting notes, decisions, and approvals captured.

Key Responsibilities

- **Cross-Functional Leadership:** Be the connective tissue across teams; simplify complexity into clear choices.
- **Discovery & Strategy:** Maintain living wealth plan; map goals across entities, trusts, and operating assets.
- **Investment Coordination:** Align IPS with CIO, manage cash flows, private deals, and capital call planning.
- **Tax & Estate:** Coordinate with CPAs/attorneys on annual plans, trust mechanics, and funding strategies.
- **Wealth Management:** Coordinate with Wealth Managers on annual plans, and strategies.
- **Governance & Education:** Facilitate family meetings, owner education, and next-gen engagement.
- **Reporting:** Deliver consolidated quarterly reports; simplify complexity into actionable summaries.
- **Service Management:** Own ticketing/tasks; ensure SLAs are met; escalate risks early.
- **Opportunities & Growth:** Identify value-add initiatives (philanthropy, credit, insurance, co-invests).

Ideal Candidate Profile

- High EQ, exceptional organization, and calm under complexity; thrives as the "air traffic controller."
- Clear, concise communicator—translates technical topics into confident client decisions.
- Proactive problem-solver with a bias for action and ownership.

Qualifications

- Bachelor's in Finance/Business (CFP®, CFA®, CPA, or JD/LLM exposure a plus).
- **5+ years**' experience preferably in in family office, private bank, or UHNW RIA client leadership.

- Strong grasp of investments, tax & estate coordination, trust mechanics, and liquidity planning.
- Comfortable with private deals, capital calls, K-1s, and multi-entity structures.

Why Join

- Be the trusted point of contact for remarkable families with complex needs and deep impact.
- Empowered, collaborative culture; high agency, low bureaucracy.
- Competitive compensation with performance incentives; clear growth path.