



Arlington[®]

FAMILY OFFICES

JOB DESCRIPTION FAMILY WEALTH COORDINATOR

Summary

Arlington Family Offices is purpose built to independently advise complex, high net worth families. Arlington's model is built on curating the very best people – people families can trust for generations to come. The firm advises on family assets exceeding \$8 billion. The Family Wealth Coordinator serves as a key member of the Wealth Planning team and is responsible for working with Family Wealth Advisors (FWAs) to enhance the lives of the families we serve.

Essential Duties and Responsibilities

To successfully perform this job, an individual must be able to perform each essential duty satisfactorily. Please note that this position is not restricted to the responsibilities below, and the job scope and responsibilities are subject to change.

- Develop and maintain positive working relationships with clients and colleagues. Approach all interactions with a service mentality.
- Work with FWAs to support client families by participating in client meetings, documenting meeting minutes, tasks, and addressing ad hoc client questions and concerns.
- Assist with the intake of new clients to ensure their smooth transition to Arlington
- Manage and enter fund transfer requests from clients or FWA(s) including verifying wire instructions, accuracy of requests, and due diligence necessary to help recognize fraudulent requests
- Manage and enter new account requests, new client paperwork requests, and other adhoc requests as necessary to administer client relationships
- Assist FWA in documenting and managing follow-up necessary to ensure requests are completed in a timely manner
- Engage in client-centric, high touch, professional communication with clients as requested by the FWA(s)
- Arrange client, internal and other meetings as required to serve client families
- Gather and distribute materials in advance of meetings
- Coordinate with internal and outside tax accountants to facilitate the production of client tax returns
- Develop life and property/casualty insurance schedules and review periodically to ensure accuracy
- Prepare reports for, interface with, and respond to inquiries from FWAs
- Maintain organized electronic files
- Complete other requests as assigned.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

- **Leadership**—Demonstrates initiative and enthusiasm. Conveys a positive attitude. Inspires others through example. Generates trust, protects Firm interests.
- **Teaming**—Supports and encourages other team members. Actively seeks input from others. Invests in success of entire team.
- **Interpersonal Skills**—Engaging, approachable, self-assured. Maintains positive relationships with peers and clients. Displays a high level of business maturity and professionalism.
- **Analysis/Decision Making**—Demonstrates understanding of overall problem and steps required to solve it. Demonstrates accuracy, thoroughness, and superior attention to detail. Willing to question own output. Goes beyond the obvious, intellectually curious.
- **Results Orientation**—Sets a very high personal bar for work product. Resourceful, tenacious, enthusiastic, and exhaustive when approaching problems. Takes ownership of driving work forward and follows projects through to completion.
- **Self-Management**—Comfortable setting direction with some assistance. Seeks and acts on feedback for self-development. Takes accountability for mistakes.
- **Communication**—Uses articulate and concise wording in written communications. Proofreads to ensure accuracy. Persuades on the basis of facts and reason.
- **Client Service**—Displays a can-do attitude. Builds a brand of dependability and trust. Sets appropriate expectations. Provides updates on status of work on a regular basis.
- **Planning & Organization**—Consistently hits deadlines. Organizes, multi-tasks, and appropriately prioritizes to fulfill requests with both long-and short-term response requirements. Leverages available resources to efficiently complete work.
- **Business Acumen**—Demonstrates expertise in essential duties and responsibilities. Takes into account links between own work and work of others. Seeks opportunities to learn about Firm and industry.

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