Family Office Client Services Assistant

Job Summary:

The Family Office Client Services Assistant is part of the Family Office (FPS) team and works in support of FPS staff, Hemenway & Barnes ("H&B") trustees, client family teams and, at the request of trustees, directly with clients to ensure outstanding customer service.

Essential Duties and Responsibilities:

1) Client Service

   a) The Family Office Client Services Assistant is a contributing member of the Family Office team. Colleagues and clients feel comfortable approaching them with questions or requests. They understand clients' and colleagues' requirements. The Family Office Client Services Assistant routes and directs client requests to appropriate personnel. They communicate with clients and colleagues in a professional manner with a focus on trust and quality customer service. They help ensure client requests are resolved accurately and in a timely fashion and client documentation is updated and stored for future reference.

   b) The Family Office Client Services Assistant develops and maintains a broad knowledge of H&B clients, services and policies. Responsibilities may require process knowledge for various financial transactions. They may be asked to provide analysis that requires data from various internal and external sources, examples include coordinating review of insurance policies held in trust accounts.

   c) They actively participate in various clients teams, including those representing some of the firm's largest and most important clients. The Family Office Client Services Assistant may work directly with client family members and/or their outside advisors.

2) Support Family Office Services

   a) The Family Office Client Services Assistant provides support for existing client team efforts – responsibilities may include scheduling meetings, distributing pre-meeting reading materials, and circulating meeting notes and follow-up. They will help with the launch of any new client teams. The Family Office Client Services Assistant will be involved in evaluating and summarizing information from multiple sources in spreadsheets and in word documents. Specific responsibilities may include producing spreadsheets that illustrate the family's total H&B relationship, creating client family trees and working closely with the Trust Department to help ensure family relationship information, used for billing, reporting and client servicing, is complete and accurate.

b) Under the direction of the Family Office Advisor, the Family Office Client Services Assistant maintains the H&B Resource and Services Directory - a list of recommended vendors. They will be the go-to person for specific client requests. The Family Office Client Services Assistant will understand the request, perform research, and provide answers to appropriate party, including directly to clients. They will ensure the recommendations and other information in the directory is current and complete.

3) Special Projects

a) Ensure the smooth operation of H&B's Family Office and Philanthropic Services by assisting with a wide range of projects and functions while working collaboratively with colleagues both inside and outside the firm.

b) Assumes additional responsibilities as requested by Family Office Advisor and the Trustees.

A successful candidate will possess the following skills:

- Knowledge of basic trust administration at a level normally acquired through completion of a Bachelor's Degree or equivalent.
- Approximately five to six years of related trust administration experience including knowledge of trusts, estates and fiduciary and individual tax requirements.
- Exceptional organization, attention to detail and time management skills. Solid analytical skills. Comfortable balancing multiple projects. Proficient working with large data sets.
- Requires patience, compassion, strong service orientation, a high level of professionalism and an aptitude and passion for learning new things. Respects the confidential nature of firm's work.

About Hemenway & Barnes LLP

Hemenway & Barnes LLP is a law firm specializing in the preservation and management of the personal, business, family, and financial assets of its clients. As one of the oldest firms in New England, the people at Hemenway & Barnes have earned a long-held reputation as premier trustees, advisors and attorneys.

To Apply:

Qualified candidates may send their resume, in confidence, to the address **hr@hembar.com.**