

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 and the Associate Director of the Family Office to ensure outstanding customer service.

Essential Duties and Responsibilities:

- a) They actively participate in various clients teams, including those representing some of the firm’s largest and most important clients.
- b) Responsible for scheduling meetings, distributing pre-meeting reading materials, and circulating meeting notes and follow-up.
- c) Maintains the H&B Resource and Services Directory - a list of recommended vendors.
- d) Assisting with a wide range of projects and functions while working collaboratively with colleagues within the firm.
- e) 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.

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 two to six years of related 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. Strong Excel skills.
- 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



Career Opportunities

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.