



JDJ Family Office Services Lifestyle Management Coordinator

COMPANY OVERVIEW - www.jdjfos.com

JDJ Family Office Services is an administrative multi-family office created in 2001 to serve affluent individuals and families. JDJ was founded on the premise that as wealth increases, so does the volume of day-to-day financial and administrative responsibilities. JDJ simplifies the lives of our clients by managing these responsibilities for them, offering a variety of high-end, confidential, customized, customer-focused services performed by professionals who have an expertise in both finance and administration.

Our services include personal accounting and net worth reporting; budgeting and cash flow planning; bill paying and expense reporting; tax planning coordination; investment and balance sheet administration; trust and estate administration; and lifestyle management.

JOB DESCRIPTION & RESPONSIBILITIES

JDJ seeks a qualified individual for the position of Lifestyle Management Coordinator to provide insurance administration and household management services for JDJ clients.

- Proactively maintain household vendor schedules and maintenance calendars for client homes and update throughout the year, coordinating with the client, or the client's on-site representative.
- Schedule household vendor appointments on behalf of clients. Occasionally attend vendor appointments at client homes. Take detailed notes, ask questions for additional follow-up and communicate with vendor, client and internal team as needed.
- Vendor due diligence and research service providers in a particular field.
- Visit client homes to pick up, administer client's mail. Sort through and identify urgent items. Call to remove names from mailing lists. Scan Accounts Payable or other documents and e-file. Adhere to client specific procedures on the management and follow up of mail items.
- Property and Casualty insurance administration. Day to day communication with client's insurance agents for updates needed on policies such as purchases of cars, homes, boats, or valuable articles. Responsible for maintaining all insurance files for clients, electronically.
- Perform health insurance research and cost analysis on behalf of clients including Medicare and individual health insurance enrollment. Submit out-of-pocket medical expenses for reimbursement on behalf of clients and follow up as needed to resolve outstanding issues.
- Assist with domestic staff management. Responsibilities may include formulating job descriptions, searching for candidates, interviews, drafting employment agreements, and payroll set up. Continued payroll processing, assist in ongoing staff communications and potentially terminations.

- Perform client research and analysis, as needed (i.e. car purchases, vacation options, appliance brands, venues for events, etc.)
- Assist with filing in client's homes and adapt to different filing styles as needed (both paper and electronic files). Occasional organizing projects with several months of paperwork which require scanning and saving documents.
- Assist with distribution, donation, and sale of Red Sox and Bruins season tickets for multiple clients.
- Assist with client projects and tasks, as requested. Could include running errands for clients or JDJ.
- Prepare outgoing deliveries (FedEx, messenger service etc.) and certified mail.
- General duties, including copying, scanning, and faxing.
- Assist with other corporate or client administrative projects.

JOB REQUIREMENTS & QUALIFICATIONS

- High School Diploma. Bachelor's or Associate's Degree preferred.
- 5 years prior insurance, household management or administrative experience required.
- Computer literacy is required, including proficiency in the use of all Microsoft Office programs and internet research.
- Self-starter with the ability to work independently and demonstrate initiative to learn new skills and tackle a wide variety of client requests with enthusiasm. Willing to put in the extra time needed to master new skills.
- Ability to transfer skills and insight learned from one project to another.
- Ability to manage not only themselves, but others, meaning vendors, or domestic staff that clients employ.
- Strong attention to detail and accuracy.
- Ability to interact with clients and vendors in a professional manner and with confidence.
- Adhere to high confidentiality and fiduciary standards.
- Ability to organize, prioritize, and execute successfully in a fast-paced environment.
- Follow-through on all deadlines and commitments.
- Desire to participate in and contribute to the growth of a small company.
- Driver's license needed (access to a vehicle can be provided).

CONTACT

Submit resume, cover letter and salary requirements to hr@jdjfos.com. No phone calls, please.

EQUAL EMPLOYMENT OPPORTUNITY

JDJ is an equal opportunity employer. Qualified applicants are considered for employment without regard to age, race, color, sex, marital status, religion, creed, ancestry, national or ethnic origin, physical or mental disabilities (as defined in the Americans with Disabilities Act), sexual orientation, or gender identity.