



## **JDJ Family Office Services Lifestyle Services Coordinator**

### **COMPANY OVERVIEW - [www.jdjfos.com](http://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 Services Coordinator to provide household management, insurance administration, and concierge services for JDJ clients.

- Coordinate and schedule household vendor appointments and manage follow up as necessary. Occasionally attend vendor appointments at client homes.
- Manage household vendor schedules and maintenance calendars for client homes and update throughout the year.
- Conduct vendor due diligence and research service providers in a particular field.
- Visit client homes to pick up, administer client's mail. Adhere to client-specific procedures on the management and follow up of mail items.
- Property and Casualty insurance administration. Communicate with client's insurance agents to update policies on cars, homes, boats, or valuable articles. Maintain electronic insurance files.
- Perform health insurance research and cost analysis, including Medicare and individual health insurance enrollment. Submit medical expenses for reimbursement.
- Assist with domestic staff management. Responsibilities may include formulating job descriptions, searching for candidates, interviews, drafting employment agreements, and payroll set up.
- Perform client research and analysis for car purchases, vacation options, appliance brands, venues for events, etc.
- Maintain paper and electronic files for clients.
- Season ticket management.
- Manage JDJ's client billing process, including running time reports and analysis, and drafting invoices for review by client teams.
- General administrative duties, including binding, copying, scanning, and faxing, FedEx.
- Provide coverage for receptionist and administrative duties.
- Assist with corporate or client administrative projects as needed.

### **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](mailto: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.