



## **JDJ Family Office Services**

### **Senior Lifestyle Management Associate**

#### **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 Senior Lifestyle Management Associate to provide household management, insurance administration, and concierge services for JDJ clients.

- Manage Property and Casualty insurance programs for clients, including annual reviews, claim management, and day-to-day agent interaction. Identify key insurance events which trigger coverage adjustments for policies on cars, homes, boats, or valuable articles.
- Perform health insurance research and cost analysis, including Medicare and individual health insurance enrollment. Submit medical expenses for reimbursement.
- Manage hiring of domestic staff for clients. Responsibilities may include formulating job descriptions, screening and interviewing candidates, finalizing employment paperwork.
- Outsourced HR management of domestic staff for clients, including payroll administration, onboarding, and providing performance feedback. Apply knowledge of different states' employment and tax laws. Understand and implement employer insurance requirements.
- Pro-actively manage clients' home maintenance calendars and scheduling of client vendor appointments. Manage complex vendor issues by knowing what questions to ask.
- Manage concierge special projects. Delegate projects and oversee other staff.
- Perform client research and analysis for car purchases, vacation options, appliance brands, venues for events, etc.
- Respond timely to internal and external requests in a professional manner, demonstrating competency, judgement and trustworthiness. Understand the client's needs and think proactively to address unasked or follow-up questions.
- Understand profitability, realization and JDJ's business objectives. Support and implement corporate initiatives and grow client relationships.

**JOB REQUIREMENTS & QUALIFICATIONS**

- Bachelor’s degree required. Additional industry-relevant certifications preferred.
- 5+ years prior insurance, household management or concierge experience.
- Computer literacy is required, including proficiency in the use of all Microsoft Office programs, Salesforce, QuickBooks, 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.

**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.