Position Specification

Single Family Office
President

Private and Confidential

The Client

Our client is a newly established family office based in Houston, Texas. The family office will serve the personal, financial, accounting, reporting, tax, fiduciary, philanthropic, and administrative interests of the Principal and their related entities.

The President will report directly to the Principal, who is the Chief Executive Officer of a highly successful U.S. operating business. The President will partner with the Principal to determine the strategic vision and priorities for the family office today and in the future. As a senior trusted advisor, the President will support the Principal in making informed decisions to preserve and grow their wealth, while freeing their time to focus on the operating company, personal, family, and philanthropic priorities. The President will serve as the trusted proxy, leading the office's design, buildout, and execution from the ground up.

This role requires a seasoned executive who has "been there and done that," successfully built and led a de novo family office, navigated founder dynamics, and brings the clarity, structure, and foresight required to support a best-in-class family enterprise. The President must bring a combination of strategic vision, operational discipline, and personal judgment to establish credibility from day one, while scaling the office to meet the needs of the Principal, their family, and future generations.

The Opportunity

This position offers an excellent opportunity for an experienced family office/wealth management executive with broad knowledge of finance, accounting, reporting, tax, trusts, estate planning, risk management, philanthropy, and family education. This leader will establish and oversee the day-to-day operations and delivery of services for the newly established family office.

The successful executive will have experience working with multi-generational families and a thorough understanding of family office services, operations, organizational structure, and best practices. The President will be a strategic leader with exceptional business, financial, and advisory skills needed to instill confidence and establish credibility as a senior trusted advisor for all family members, including future generations.

The successful executive will:

- **Build a family office from scratch,** including designing the operating model, building out a world-class team, and determining optimal insource/outsource strategies (buy versus build).
- **Serve as a trusted advisor and strategic partner** to the Principal and family, helping them anticipate needs, solve problems, and coordinate across all aspects of wealth, family, and business.
- **Integrate family and enterprise priorities** to ensure household, philanthropic, investment, and governance activities are managed seamlessly.
- **Operate with discretion, loyalty, and a strong commitment to service** while navigating complex family dynamics with calm judgment.

- **Strive for excellence and continuous improvement**, setting high standards for quality, execution, and outcomes while building a culture of accountability and purpose.

This is an excellent opportunity for a seasoned family office executive to create long-term value, support a founder-led enterprise, and architect a multi-generational legacy platform.

Location: Houston, Texas

Reports to: First-Generation Principal and Founder

The Position

Key responsibilities include:

- **Strategic Planning & Vision**
  - Define priorities, goals, actions, initiatives, and metrics. Clearly present what they are, why they were selected, why they are important, and how they will be executed.
  - Partner with the Principal to develop the strategic vision and goals for the family office.
  - Craft and execute an institutional framework for transitioning to a single-family office.
  - Anticipate “what’s next” and design scalable structures for future needs, including governance and generational planning.
  - Build a single source of truth across assets, encompassing equity, trusts, and liquidity.
  - Deliver intelligent reporting that ties capital to family goals and company equity.
  - Act as a capital allocator, not just an advisor.
  - Design proactive structures for liquidity events, estate triggers, and tax exposures.
  - Orchestrate legacy-driven planning, including long-term trusts, philanthropy, and education platforms.
- **Organizational Buildout & Leadership**
  - Build the family office infrastructure from the ground up, including designing the organization chart, creating the business plan, recruiting, hiring, and mentoring staff.
  - Establish and oversee policies, systems, and processes that enable efficient operations and effective service delivery.
  - Create culture of growth, excellence, and purpose that drives engagement and retention.

- **Advisor & Relationship Management**
  - Serve as the family's central liaison with external advisors (tax, legal, accounting, investment/wealth management, philanthropy, and other specialists).
  - Coordinate and oversee outsourced providers and vendor relationships, ensuring optimal alignment, performance, and complementary internal infrastructure buildout.

- **Trusted Advisor & Thought Partner**
  - Act as a thought partner to the Principal and family members, providing objective counsel and guidance on personal, financial, and strategic matters.
  - Exercise discretion and judgment in sensitive situations, escalating only when appropriate.
  - Manage personal and professional alignment without blurring boundaries.
  - Serve as trusted proxy of Principal (speak and act as an extension of the Principal).

- **Operational & Household Management/Full Life Integration and Execution**
  - Oversee holistic services, including financial reporting, compliance, philanthropy, property management, and lifestyle support.
  - Ensure the family operations, including travel, properties, vendors, education, household, and personal affairs run seamlessly, allowing the Principal to focus on business, passions, and quality of life.

- **Continuous Improvement**
  - Implement technology (including AI-enabled tools) to improve reporting, decision-making, and efficiency.
  - Drive excellence and continuous improvement in all aspects of the family office.

The Ideal Candidate

Qualifications:

The successful candidate will be an accomplished executive who combines strategic vision with humility and hands-on execution. They will bring a service-oriented mindset and the ability to operate with discretion, loyalty, and calm under pressure. A natural relationship-builder, the candidate will foster trust and credibility with the Principal, family members, and advisors alike. They will demonstrate intellectual curiosity, sound judgment, and a commitment to continuous improvement. Above all, the individual will embody integrity, resilience, and a drive for excellence, ensuring the family office not only runs effectively today but also lays the foundation for a lasting legacy.

The ideal candidate will be an expert generalist with a strong background in family office/wealth management and will be a strategic and proactive leader with strong financial and business acumen. The individual will have a thorough understanding of family office best practices and services, and a track record of success in managing family office operations. They will also have exceptional communication skills, excellent client relationship management capabilities, and the intellectual capacity, work ethic, and professional integrity necessary to successfully lead the newly established family office.

The ideal background will include:

- Minimum of 15 years of experience in the family office/wealth management industry.
- Undergraduate degree required; advanced degree preferred (i.e., JD, MBA, LLM). Relevant certifications are desirable (i.e., CFP).
- Prior experience working with/advising first generation entrepreneurs in the creation and build out of a single-family office.
- Understands and can relate well to a founder's mindset and their needs and issues.
- Demonstrates a high degree of initiative and effectively anticipates and responds to all client needs.
- Possesses a service heart.
- Knowledgeable of best practices around installation of family office systems and processes.

- **Leadership & Values:**
  - Mission-driven, selfless, and committed to excellence.
  - Comfortable operating in a founder-led organization.
  - Disciplined and process oriented, with strong project management and problem-solving skills.
  - Calm, candid, and solutions-oriented; able to embrace ambiguity.
  - High EQ with discretion, loyalty, and confidentiality.
  - Proactive yet flexible, with a roll-up-your-sleeves mentality that balances strategy and execution.
  - Candid, collaborative, fact-based, data-driven, mission-centric mindset.
  - Proven approach to mentorship, training, and leadership development.
  - Owns outcomes, not just tasks.
  - Focused on long-term legacy.

- **Skills & Knowledge:**
  - Ability to recruit and retain top tier talent from day one.
  - Broad understanding of family office services, including organization design and rationale, finance, tax, philanthropy, and governance.
  - Strong professional network and ability to know "who to call" for specialized expertise.
  - Technologically fluent and familiar with AI-enabled decision-making and reporting.
  - Strong orientation around clear goals, actions, and metrics.
  - Experience acting as a strategic steward of capital.

Compensation

An industry-competitive package will be offered, including comprehensive benefits.

Brian C. Adams
Partner
615-339-7887 (mobile)
badams@mackinternational.com