

**Chief of Staff - Office of the [Family Office]**

## [Family Office Mission Statement / Description]

*Salary Commensurate with Qualifications, Education & University Guidelines.*

*We recommend membership in the Chief of Staff Association forms part of any renumeration package.*

Position Information

# Basic Function

The Chief of Staff (COS) shall serve as a member of the senior management team of [family name], with authority over a wide range of management and technical assignments within the organization. They will also be assigned special projects that may be on-going and/or non-recurring in nature.

# Dimensions

The COS shall supervise the work of office staff, professionals, consultants, executive assistants, office secretary, human resources, and the scheduler to varying degrees at [organization name]. They will work collaboratively with members of the family office as well as the family itself.

# Nature and Scope

The COS will liaise, organize, and execute in relation to internal stakeholders including the Board of Directors, the Family, executives, administrators, human resources, office secretary, employees and staff. They will also liaise, organize, and execute in relation to external parties including tax and accounting experts, foundations and fundraisers, auditors, legal representatives, representatives from financial institutions, and investment managers, among others.

# Principle Duties

## The COS will:

* Principal advisor to the Family and its office.
* be responsible for directing the operations of the family office while maintaining constant interface with the core committee to ensure that key issues are proactively addressed.
* manage the bi-directional flow of communication in and out of the family office to ensure consistent and responsive message delivery to key internal stakeholders, including other executives, employees, and staff.
* assist in planning, developing and establishing policies and goals consistent with family office’s objectives.
* coordinate some specific engagement activities with the family office around specific strategic and operational matters.
* maintenance of the homes, yacht, jets, and other physical resources of the family.
* overseeing scheduling team for the use of these assets by various family members.
* overseeing the travel team, with the responsibility of booking travel for the family and compliance with budget, ensuring their comfort and satisfaction during travel. Ensuring passport and immigration facilitation for the family during international travel.
* overseeing and ensuring financial control policies are implemented.
* addressing family legal affairs in conjunction with legal counsel.
* ensuring the successful function of the philanthropy arm of the family office.
* helping the family with media relations, including the issuance of press statements and preparation for media appearances. Support the family with media training and compliance with te media policy.
* assisting with any succession planning considerations as appropriate.
* liaison with tax and accounting experts, as well as endowment and investment managers, to act in fiduciary duty to the family.
* assisting with the schedule, budget, oversight, and execution of the family foundation’s event management itinerary and agenda.
* prepare an agenda for each senior executive meeting and provide a summary of discussions and action items resulting from each meeting to attendees, with appropriate follow-up.
* build and maintain mutually supportive relationships within the organization. Work to remove barriers that hamper inter-and intra-department communications.
* coordinate and monitor assignments which must be accomplished in conjunction with other senior executives.
* oversee the family’s security requirements, including liaison with [Security Agency].
* perform other related duties as assigned.

# Core Competencies

## The COS must possess and demonstrate competencies in:

* the principles, practices and methods utilized in progressive leadership and staff level management.
* computer skills (Microsoft Office Suite); Excel and PowerPoint presentations.
* skill in management and leadership with the ability to direct programs, staff and cross-functional teams in an efficient and effective manner.
* exceptional interpersonal skills including tact, patience, and acumen and the ability to work with many, diverse individuals and groups across various functions.
* excellent organizational and analytical skills and the ability to formulate recommendations and improve team dynamics.
* writing press releases and preparing materials for the media. Excellent oral and written communication skills including creative writing, presentation development and presentation skills.
* the ability to prioritize work actions and follow-up with meticulous attention to detail and accuracy.
* the ability to work effectively under pressure, handle multiple priorities, tasks, demands and time- sensitive pressurized situations.
* the ability to establish and maintain effective and harmonious relations with the organization’s internal and external stakeholders.
* working in a fast-paced environment; and commitment to completing tasks on time and to the highest ethical and professional standards.

# Minimum Requirements

Master’s Degree in Business/Public Administration or related field, and [range] years of relevant experience and/or an equivalent combination of [range] years combined higher education/training and experience.

Previous experience with a family office is an asset.

***Note:*** *This position description should not be construed to imply that these requirements are the exclusive standards for the position. Incumbents will follow any other instructions, and perform any other related duties, as may be required as directed by the organization. [Organization name] has the right to revise this position description at any time. This position description is not and should not be construed as a contract for employment.*