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| Job title | <i>Client Solutions Group Director</i> |
| Reports to | <i>Chief Operating Officer</i> |

Job Purpose

An AndCo Client Solutions Group Director is responsible for managing assigned Client Solutions Group team members. This management responsibility includes training, mentoring, monitoring, and enforcing AndCo's client service standards, job responsibilities, work product, and firm policies & procedures.

Duties and Job Responsibilities

- Execute the directives provided by the Executive Director of Client Solutions and Chief Operating Officer.
- Communicate, educate, assign, and enforce firm initiatives and tasks, policies and procedures, job responsibilities, and utilization of tools including IT and software.
- Direct the daily activities of non-management employees. Monitor and ensure work and service quality. Assign tasks and ensure execution.
- Train, coach, develop, motivate, team building, well-being, provide technical expertise, and hold direct reports accountable.
- Employee performance management & reviews.

Required Skills

- Strong operational and management experience.
- Expert understanding of performance measurement and reporting for public, private, and alternative investments.
- Extensive industry knowledge including Global Investment Performance Standards.
- Expert understanding of performance and reporting systems and custodial data feeds.
- Ability to manage within the context of the firm and the firm's vision.
- Flexibility, temperament, and compassion to multi-task and manage diverse personalities within a fast-moving and demanding environment.
- Desire to foster an environment of accountability through direct conversations.
- Ability to act and react as necessary, even if limited information is available.
- Ability to overcome resistance to leadership and take unpopular stands when necessary.
- Ability to guide team members through all available resources.
- Strong written and verbal communication skills.
- PC proficiency and training ability in the Microsoft Office suite of applications as well as other specialized software used by the firm.

Qualifications

- Bachelor's degree from an accredited university. Finance and accounting majors are preferred.
- A minimum of 5 years of performance management experience
- A minimum of 8 years of experience managing a team
- CIPM, CFA, or MBA encouraged.

Working Conditions

This job is located in Winter Park, Florida. Standard office hours are 8AM-5PM. This is an Exempt position.