

## ACCOUNTANT, FAMILY OFFICE

**POSITION:** Accountant; Family Office

**LOCATION:** Rancho Santa Fe, CA (San Diego County); Full Time, On-Site (No remote option)

Our team has been hired to identify an Accountant for the family office of a wealthy client. This position will be a full time position located at the client's home office in Rancho Santa Fe, CA.

This person will work independently *ON-SITE* with minimal guidance and oversight. They will have a strong finance and accounting background and will be responsible for a range of financial duties.

### **ROLES AND RESPONSIBILITIES:**

- Preparation of general ledger and financial statements.
- Implement process improvements with spreadsheet and presentation software
- Prepare payroll tax deposits, returns, and other filings for domestic and other employees on a monthly, quarterly and annual basis
- Prepare tax returns on a quarterly basis
- Ensure compliance with all relevant accounting standards, legal regulations, and reporting documents
- Prepare annual budget, projections, and financial statements for family-owned entities (to include trusts, partnerships, corporations, and other related entities)
- Assist with estate planning and general financial planning
- Assist outside investment advisors, attorneys, and other service providers by supplying information as needed
- Provide administrative support to properties owned by the family
- Assist with other personal administrative duties within the family office

### **EDUCATION AND EXPERIENCE REQUIRED:**

- BA/BS degree or equivalent practical experience in finance, accounting, or a related field.
- **4+ years** of prior experience in the financial reporting/general ledger area
- Full cycle bookkeeping
- Must be legally authorized to work in the United States

### **PREFERRED ATTRIBUTES:**

- Advanced accounting degree
- **Certified Public Accountant (CPA)** qualification or within 30 days of employment
- **6+ years** of accounting experience
- **2+ years** working in a family office
- Hands on experience working with a family office
- Big 4 prior employment



REDEPLOYMENT

**BENEFITS:**

- Salary: \$70K - \$90K; DOE
- PTO
- Paid Holidays
- Medical and Dental options available
- Full benefits package to be discussed on a per-person basis

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