LYNEER SEARCH GROUP

CASE STUDY

WEALTH MANAGEMENT | FAMILY OFFICE | TAX AND ACCOUNTING

A family office needed a local, CPA-level professional to work with its principals. We placed a candidate aligned to its requirements.

The search required technical accounting and tax expertise, family office experience, and the judgment to work closely with high-net-worth principals.

INDUSTRY	CLIENT TYPE	ROLE	COMPENSATION	ENGAGEMENT	RESULT
Wealth management	Family office	Portfolio Strategist	$175K	Retained search	Candidate placed

THE SEARCH

A retained search for a family office seeking a local, highly experienced financial professional capable of working directly with high-net-worth principals and managing sophisticated financial operations.

KEY REQUIREMENTS

- CPA with 10+ years of progressive experience
- Family office operations experience
- Ability to manage complex, multi-entity financial structures
- Strong background in tax and accounting
- Experience working with high-net-worth principals
- Highly results-oriented, discreet, and detail-focused approach

SEARCH CHALLENGE

This search required extensive market mapping and in-depth candidate conversations to identify a professional with the rare combination of technical accounting and tax expertise, family office experience, and the judgment required to work closely with high-net-worth principals.

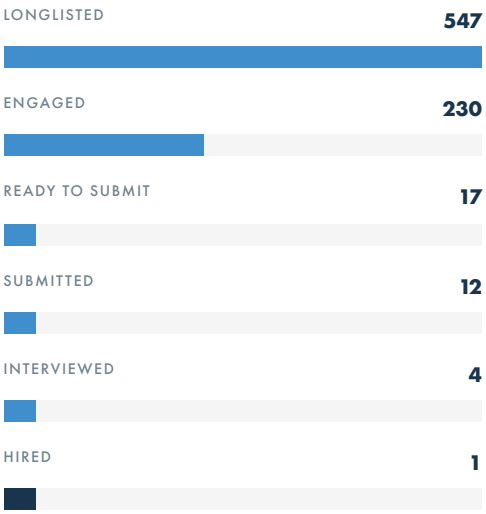
HOW WE RAN THE SEARCH

1. **Mapped the market extensively.** 547 candidates were longlisted to find the combination of tax, accounting, and family office experience.
2. **Held in-depth conversations.** 230 candidates were engaged, each assessed on technical depth, discretion, and judgment with principals.
3. **Submitted a focused slate.** 12 candidates went to the family and 4 were interviewed, leading to 1 placement.

THE OUTCOME

The search resulted in the identification and placement of a candidate aligned with the family's highly specialized requirements.

THE SEARCH FUNNEL



547 : 1

CANDIDATES LONGLISTED PER PLACEMENT

WHY IT MATTERS

A family office hire depends on a rare combination of CPA-level tax and accounting expertise, family office experience, and the judgment to work with principals. We mapped 547 candidates and engaged 230 of them in depth. 17 were ready to submit, 12 were submitted to the family, 4 were interviewed, and 1 was hired.

Ready to start a search?

We place finance, accounting, underwriting, and actuarial leaders at insurance carriers, MGAs, reinsurers, RIAs, family offices, and financial services firms, and have done it since 1993. Every retained search we have accepted has ended in a placement.

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