

PROJECT MANAGER

ONE FIRM • ALWAYS GROWING • BE ENTHUSIASTIC • BE CURIOUS • SOLVE PROBLEMS

EMPLOYER PROFILE:

Drucker & Scaccetti (D&S) is a Philadelphia-based tax strategy and consulting firm founded in 1990. D&S has more than 80 employees providing tax, business and financial consulting services specifically tailored to their clients. We specialize in working with complex businesses, families and closely held entrepreneurial-driven businesses.

JOB PROFILE:

We seek a Project Manager with 5 or more years of experience to join our team. The Project Manager reports directly to the partners of D&S. Our practice is diverse, and our clients include complex S corporations, partnerships, C corporations, trusts, estates, high-net-worth individuals, and family groups.

Essential Duties and Responsibilities:

- Manage client relationships
- Project manage and improve efficiency of client engagement
- Develop an understanding of client's needs to successfully identify communication styles, deliverables and consulting opportunities
- Ensure client service expectations are met and exceeded
- Prepare for, attend, and execute a high volume of client meetings or phone calls

Additional Possible Duties and Responsibilities:

- Build the firm brand with clients and prospects, attend networking events
- Communicate with D&S personnel to manage and safeguard the completion of newly identified projects
- Attend workshops, CPEs and/or educational seminars to enhance awareness of trends and latest wealth management planning strategies
- Initiative Management, including assisting in strategic opportunities and implementation
- Working alongside a data analyst to implement firm efficiency initiatives and client consulting opportunities
- Apply experience with data, financial, industry and market trends analysis to improve firm efficiency or client situations

Requirements:

- Bachelor's Degree in business or economics. MBA or Master's Level Business Related Degree desired

- 5 or more years' experience
- Experience managing relationships with senior leaders with varying styles
- Strong management skills, including the ability to effectively plan, monitor, influence and negotiate
- Active Listener – able to understand the root of what a client needs with the ability to match that need with the right solution
- Ability to think strategically and analytically, and manage multiple clients and projects
- Financial analytical abilities
- Strong presentation and interpersonal skills; strong written and oral communication skills
- Reliable transportation, as travel to and from existing clients may be necessary
- Ability to work overtime when necessary

We offer a general benefits package, plus we pay for continuing education, in most cases. We offer referral fees for business development success, and we offer in-house leadership development programs.

Job Description:

- Responsible for overall delivery and management of the client service experience
- Accountable for proactive internal account activity management, client service, client advocacy, transition management, and problem resolution to improve the client experience
- Responsible for transition and coordination of clients to D&S
- Liaison to various partners to drive client satisfaction opportunities
- Define relationship strategies and build relationship improvement plans and actions as needed to ultimately drive client loyalty and renewal
- Collaborate with internal partners to identify key issues and additional service opportunities
- Gather client feedback regarding firm performance and level of satisfaction
- Develop and maintain a strong network of consultant and advisor relationships, including investment advisors, attorneys, lenders, insurance advisors, HR advisors, etc.
- Other duties, as requested