

Jonathan Phillips

Personal Assistant

Senior Personal Assistant and Estate Manager with 18 years supporting ultra-high-net-worth principals across three multi-residence households. Lead household staff of up to 14, oversee multi-million-dollar property budgets, and act as primary point of contact between the principal, family office, and outside professionals.

CONTACT INFORMATION

-  (203) 555-0119
-  eleanor.ashworth@example.com
-  Greenwich, CT 12345

KEY SKILLS

- Multi-residence estate management
- Household staff hiring, training, and payroll
- Capital project and renovation oversight
- Multi-million dollar budget management
- Family office and CFO liaison
- Private aviation and yacht coordination
- Crestron, security systems, Nines household manuals
- Charity event production
- Crisis and reputation discretion
- NDA, confidentiality, and protocol training

PROFESSIONAL EXPERIENCE

CHIEF OF STAFF TO PRINCIPAL | ALDERMERE HOLDINGS (SINGLE FAMILY OFFICE), GREENWICH, CT 2019 – PRESENT

- Serve as right hand to a hedge fund founder across Greenwich, Aspen, and Palm Beach residences
- Manage a household operating budget of \$3.2M annually, including payroll for 14 staff
- Lead the build-out and move-in for a \$42M Aspen property, coordinating designers, GC, and 6 specialty trades
- Negotiate and review household vendor contracts with the family attorney, saving 12-18% versus prior renewals
- Plan an annual 80-guest charity dinner that has raised \$1.4M for the principal's foundation over four years

ESTATE MANAGER AND SENIOR PA | VANDERHOEK FAMILY, DARIEN, CT 2013 – 2019

- Ran day-to-day operations for primary residence plus a Nantucket summer home and a Manhattan pied-a-terre
- Supervised staff of 9: chef, two housekeepers, butler, two drivers, gardener, nanny, and house manager
- Coordinated the family's 32-foot sailboat schedule, captain, and provisioning each summer season
- Owned the household tech stack: Crestron, security, Wi-Fi, and a Nines-based household manual
- Liaised with the family office on quarterly household reporting and capital projects

PERSONAL ASSISTANT TO CEO | HOLBROOK MEDIA GROUP, NEW YORK, NY 2008 – 2013

- Managed personal life of a media CEO including travel, bill pay, and family scheduling
- Coordinated annual family ski trip for 18 across three generations
- Acted as discreet liaison with the CEO's communications team during a public divorce
- Hired and onboarded a junior PA and built the position's first written SOP binder

EXECUTIVE ASSISTANT | PEMBERTON WEALTH ADVISORS, NEW YORK, NY 2006 – 2008

- Supported managing director and team of 6 advisors at a private wealth firm
- Coordinated client events at the University Club and Pierre Hotel for 40-120 guests
- Maintained confidential client files under FINRA and firm compliance standards

EDUCATION

- B.A. Hospitality Management, Cornell University School of Hotel Administration, 2006
- Estate Management Certificate, Starkey International Institute, 2014