



Tom Smith - *Elite Family Office Operations Exec*

\$300M+ AUM @ < 0.4% OA Cost | Deep Ops & Tech Governance

Overview

Contact

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Tom recently built and ran a multi-asset SFO with hundreds of millions in capital, deploying into private equity, hedge funds, direct investments, and real estate.

He specializes in building lean, integrated teams and achieving operational excellence—kept SFO costs under 0.4% AUM for 12 years with multimillion-dollar EBITDA improvements across prior business lines.

Tom is a strategic operator and family office executive with decades of experience leading complex operations across private equity, manufacturing, and single family office environments.

Core Competencies

- ✓ **FO Management** – training staff while keeping costs under 0.4% of AUM
- ✓ **P&L Oversight** – develop and update KPIs
- ✓ **Capital Deployment (PE, RE, Funds)** – sub docs, wire transfers, > \$10M/mo
- ✓ **Budgeting, Forecasting, Reporting** – Custom to Real-time (depending on softw)
- ✓ **Third Party Liaison (Acct, Bank, Broker, Legal)** – reliable/discrete contact
- ✓ **Operational Restructuring** – debottlenecking, organizing chaos, create SOPs
- ✓ **Governance & Risk Management** – succession planning
- ✓ **Team Building & Mentorship** – training, stress-testing
- ✓ **Business Turnaround** – 20% loss to 20% EBITDA
- ✓ **Technology & Cyber Risk Oversight** – trained people to avoid > 36 million attacks
- ✓ **Complex Problem Solving** – multitasking, strategy, modeling

Career Highlights / Achievements

- Led buildout of Single Family Office post-liquidity event, deploying & reporting capital across private equity, hedge funds, real estate and direct investments, while managing lean operations at <0.4% of AUM, and millions of transactions annually.
- Tripled sales and improved EBITDA by 25% at a capital equipment manufacturer by streamlining operations, reducing costs and prices, and realigning teams—resulting in a doubling of productivity, and improving on-time shipments from 60 to 97%, while also decreasing lead-times 25%.
- As CFO of a semiconductor chemical manufacturer, drove operational efficiencies (late deliveries down 85%, increased capacity 30%) and strategic direction (marketing to end-users while supporting distributors), supporting scale-up for eventual acquisition.
- Built and managed cyber risk governance frameworks and internal tech infrastructure and cloud-based operations and backup for lean organizations, often serving in CIO role.

Education & Cert

NJ Inst of Tech,
BS Chemical Eng
Cyber Risk Governance
Strategic Leadership & Innovation
Corporate Governance
Board Member Essentials

Prior Positions

CEO (Board)
COO, Gen Mgr (Board)
CFO, VP Finance
Project Manager
Process Engineer
AMA / MBA courses
Profit/Non-profit/Found

Family Office Fit

- **Best in:**
SFOs with multi-disciplined complex needs
- **Ideal scope:**
Strategic Finance & Operations
- **Style:**
Lean, data-driven, hands-on execution