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Family Manager, Senior Personal Assistant, and Multi-Estate Manager

Ultra High Net Worth Entrepreneur Family

Part-Time, 2015 – 2021 | Full-Time, 2023 – Present

Austin, Miami, Los Angeles, & International

Personal and Family Support:

- **Runs Errands:** Manages and completes personal shopping and errands, including grocery shopping, dry cleaning, sourcing unique gifts, procuring hard-to-find items, and handling personal appointments.
- **Social Relations:** Plans and executes a wide range of social events, from intimate family gatherings and children's birthday parties to large-scale dinner parties and networking events with influential leaders and public figures, fostering strong relationships within their community.
- **Travel Attendance:** Accompanies the family on domestic and international trips to facilitate successful meetings, networking opportunities, and family experiences.
- **Travel Logistics Management:** Annually coordinates 3 weeks of complex domestic and international travel arrangements, encompassing itinerary planning, flight bookings, accommodation reservations, ground transportation, and visa procurement and proactively anticipated potential travel disruptions and implemented contingency plans.
- **Compensation Management:** Tracks expenses, adheres to budgets, processes ADP payroll, and invoices, and ensures timely payments. Knowledgeable in Gusto, Paychex, and QuickBooks platforms.
- **Supervised Estate Staff:** Oversees a team of 12, including nannies, security, and housekeepers.
- **Vendor Coordination:** Manages relationships with vendors for multiple estates, including service providers for maintenance, cleaning, and supplies; negotiates contracts to ensure cost-effective and high-quality services.
- **Multiple Calendar Management:** Organizes and owns all scheduling and logistics for the Principal's multiple calendars.
- **Managed Pet Care:** Maintains 2 dog care schedules, including grooming appointments and transportation to/from boarding, and provides dog-sitting services as needed.
- **Personal Shopping and Errands:** Manages personal shopping and errands, including sourcing unique gifts, procuring hard-to-find items, and handling personal appointments.

Childcare / Nanny Support:

- **Manages Morning Routines:** Ensures children are prepared for school with necessary items like completed homework, packed lunches, and after-school activity equipment.
- **Provides Safe Transportation:** Provided reliable and safe transportation for the children.
- **Supports Education:** Assists with school projects and homework, organizes educational activities, establishes effective study routines, and collaborates with tutors and teachers.
- **Fosters Holistic Development:** Engages children in age-appropriate activities that encourages creativity, social interaction, and emotional growth.
- **Manages Health & Nutrition:** Maintains detailed records of children's health information, administers medications as needed, and plans nutritious meals with dietary restrictions in mind, prioritizing their health and well-being.
- **Prepares Meals and Snacks:** Creates healthy and nutritious meals and snacks, accommodating dietary needs and preferences to promote healthy eating habits and well-being.
- **Assists with Bedtime and Overnight Care:** Supports bedtime routines, and provides overnight care to meet the family's evolving needs.

Senior Personal Assistant and Estate Manager

High Profile and High Networth Family

Part-Time, 2016 – 2021, 2025 – Present

Austin, Dallas, New York, & London

- **Calendar Management:** Eliminated scheduling conflicts and ensures preparedness through a shared calendar platform with automated reminders and RSVP tracking.
- **Luxury Vehicle Management:** Oversaw maintenance, registration, and chauffeur services for a fleet of high-end vehicles, optimizing usage and minimizing downtime.
- **Digital Wardrobe Management:** Created a Digital Wardrobe LookBook, saving the Principal 8+ hours per week by streamlining outfit selection and coordination.
- **Operational Foundation & Infrastructure:** Optimized team workflows, processes, and technology to drive operational improvements and support key objectives.

- **Efficient Communication:** Reduced response time to critical communications by 20% through a CRM platform that tracked correspondence and prioritized responses.
- **Strategic Sourcing & Cost Optimization:** Reduced event procurement costs by 15% through negotiation and relationship management.
- **Financial Management:** Developed and implemented a comprehensive household budget, utilizing software to track spending and identify cost-saving opportunities.
- **Inventory Management:** Maintained detailed records of household inventory, including furniture, artwork, appliances, and other valuable assets.
- **Kitchen Organization and Inventory:** Implemented and maintained a comprehensive inventory system for the kitchen, ensuring adequate stock of food staples, pantry items, and household supplies, while minimizing waste and optimizing organization
- **Manages Digital Assets:** Maintained and organized digital assets, including spreadsheets, documents, and presentations.
- **Streamlines Communication:** Facilitated communication and information flow, managing correspondence, handling inquiries, and responding to emails as the Principal.
- **Provides Administrative Support:** Offered comprehensive administrative support, including phone coverage, mail processing, and online research.
- **Multiple Calendar Management:** Organized and owned all scheduling and logistics for the Principal's multiple calendars.
- **Tracks Expenses:** Tracked business and household expenses, adheres to budgets, and prepares reports on spending.
- **Processes Payroll and Invoices:** Processed semi-monthly payroll, monthly invoices, and disbursements.
- **Office Administration:** Oversaw and executed daily office operations, including managing supplies, ordering equipment, handling mail and shipping, and maintaining common areas like the breakroom and conference rooms.
- **Team Building and Events:** Planned and coordinated office events and activities to promote team camaraderie and a positive work environment.
- **Maintained Stakeholder Relations:** Built and maintained strong relationships with additional high-profile and high-net-worth individuals through proactive communication and timely information delivery.

Life Manager, Personal Assistant, and Multi-Estate Manager

2021 – 2023

High Net Worth Individual (HNWI)

Dallas, New York, & International

Full-Time, 2021 – 2023

- **Comprehensive Medical Management:** Provided 24/7 on-call comprehensive medical management for the Principal, including: coordinating all aspects of care (appointments, medications, advocacy); managing complex treatment regimens and ensuring adherence to protocols (including radiology, chemotherapy, and oncology); and organizing/maintaining detailed medical records.
- **Stakeholder Relationship Management:** Built and maintained strong relationships with investors through proactive communication and timely information delivery, ensuring alignment and fostering long-term partnerships.
- **Confidential Investor Relations:** Managed confidential correspondence, maintained sensitive files, and interacted with a variety of investors and entrepreneurs, ensuring professionalism and discretion.
- **Board Meeting Support:** Assisted with the preparation of board decks, updated tracking systems and project plans, attended board prep meetings, handled records and other confidential materials, including board deliverables to ensure timely and accurate completion.
- **Meeting Management:** Scheduled meetings and tracked to make sure the correct preparation and deliverables were completed before each meeting.
- **Executed Improvement Projects:** Independently plans and executes various home and office improvement projects, including the zen garden, a home gym, and a revitalized patio garden.

Education

- Master of Business Administration, M.B.A; Amberton University, Candidate 2026
- Bachelor of Arts; Communication and Mass Media, Eckerd College, 2012
- High School Diploma; Miami Country Day School, 2008

Certifications

- CPR / AED / First-Aid (Adult / Child / Infant / Choking), AED / Injury & Universal Precautions; NCPRF®, 2025
- Certified Life Coach Institute; Certified Life Coach Institute - ICF Accredited, 2023

Additional Professional Experiences

- **Head of Operations and Experience // C.O.O.** | Select Chef | *Pre-Seed to Seed SaaS* 2021 – 2021
- **Head of Client Support, Enterprise** | DoctorLogic | *Series B SaaS StartUp* 2020 – 2021
- **Head of Customer Success, SMB** | Workplace Arcade | *Series A to Series B SaaS StartUp* 2018 – 2020
- **Senior Customer Experience Manager** | Favor Delivery | *Series C SaaS, H.E.B. Acquired* 2016 – 2018
- **Talent Success & Guest Services Supervisor** | LodgeWorks Partners | *Hotel Group* 2014 – 2016
- **Public Relations and Artist Experience Manager** | 3J Hospitality Group | *Entertainment StartUp* 2010 – 2014

Additional Relevant Skills

Leadership & Management: Strategic Planning & Execution, Cross-Functional Collaboration, Communication & Collaboration, Stakeholder Management, Program Management, Project Management, Change Management, Operations Management, Risk Management, Performance Management, Team Leadership, Team Development, Coaching & Mentorship, Leadership Development, Professional + Personal Support, Strategic Business Planning, Operational Excellence, Cross-Functional Leadership, Growth & Scaling, Relationship Management, Strategic Consulting, Performance Optimization, Process Improvement, Process Optimization & Automation, Workflow Efficiency, Continuous Improvement, SOP Development, SOP Implementation

Customer Experience: Customer Satisfaction & Retention, Guest Services, Conflict Resolution, Drive Product Success, Drive Product Adoption, Customer Retention, Growing Customer Base, Customer Journey Mapping, Client Onboarding, Customer Advocacy, Account Management, Upselling & Cross-Selling, Customer Return Management, Churn Reduction, Ownership of Self-Service Implementation, Build & Scale Customer Education Programs, Gainsight, ChurnZero

Data Analysis & Business Intelligence: Data-Driven Decision Making, Data Analysis & Reporting, KPI Tracking & Analysis, Performance Reporting, Data Visualization, Data-Driven Improvement, P&L Accountability, Budget Management, Customer Segmentation, Excel, Data Analysis Tools, SQL, Tableau, Looker, Web Analytics, Marketing Analytics, Google Analytics

Technology & Tools: ADP Payroll, Notion, Airtable, Asana, Monday.com, Jira, Trello, Basecamp, Microsoft Office Suite, G Suite, Slack, Salesforce, Contact Management Applications, Trainual, Microsoft Teams, SurveyMonkey, HTML, HTML5, Canva, Cobra, LinkedIn Recruiter, Zendesk, Help Scout

Marketing: Brand Management, Public Relations, Artist Relations, Event Management, Content Marketing, Email Marketing, Data-Driven Marketing, SEO, SEM, Digital Marketing, Lead Generation, Marketing Automation, Social Media Marketing, Customer Relationship Management (CRM), Campaign Management, Meta Ads, Paid Social Media Advertising, Display Advertising, Video Advertising, Mobile Marketing, Content Creation, Content Strategy, Copywriting, Storytelling, Visual Content Marketing, Conversion Rate Optimization (CRO), A/B Testing, Landing Page Optimization, DTC E-commerce, HubSpot, MailChimp, Google Ads