

MARKETING MANAGER

OVERVIEW

Responsible for the implementation of the firm's marketing strategy at the direction of the Director of Marketing. This includes oversight of the production and design of the firm's marketing materials, implementation of social media and other communication initiatives, event planning and execution, collection and distribution of firm product data to prospective clients and referral sources plus coordination of the firm's marketing calendar and budget.

RESPONSIBILITIES

- Coordinate all marketing and communication efforts with internal stakeholders as well as outside marketing consultants and third-party vendors.
- Design, develop and oversee the production of marketing materials, including brochures, presentation booklets and social media. Work with outside marketing consultant and internal management to create marketing materials. Prepare topical presentation materials for special marketing and client events as required.
- Supervise the Operations and Marketing Assistant in the production of presentation booklets for clients and prospective clients. Oversee the scheduling and production queue for these booklets to ensure they are generated accurately and in a timely manner.
- Maintain internal data and coordinate with firm's Research, Operations and Management teams plus other financial industry sources to collect and calculate the information needed to generate marketing presentation slides, brochures, RFPs and blogs. Update and set-up all presentation slides in coordination with the firm's Operations and Marketing Assistant. Use firm's internal portfolio management systems and external financial systems to calculate and generate data used in marketing and client presentations.
- Respond to all requests for materials and information from prospective clients and referral sources, including Requests for Proposal (RFPs). Update outside databases and respond to media surveys in a timely manner.
- Maintain, update and implement the firm's marketing calendar. Track marketing/client events, sporting events, and other marketing and social media communication deadlines.
- Maintain firm's marketing budget. In conjunction with the Director of Marketing, prepare annual budget and track actual expenditures. Manage actual expenditures to the annual budget.
- Manage the execution of communication and advertising campaigns, including social media and digital initiatives. Coordinate with the firm's outside marketing consulting firm as necessary. Supervise the Operations and Marketing Assistant in the completion of email campaigns. Manage the information in the firm's database to ensure that all appropriate parties receive firm and marketing information and event invitations via email or surface mail. Oversee the annual holiday card mailing.

- Coordinate the flow of content to the firm's social media outlets and blogs with the firm's outside marketing consultant and the firm's internal wealth management and financial planning teams. Ensure that the materials are prepared on time and edit the content to ensure it is grammatically correct and brand consistent.
- Ensure that the firm's website is current and regularly maintained. Update firm content and employee biographical information as necessary. Coordinate with the firm's photographer for employee photos and work with firm's marketing consultant to update imagery.
- Oversee and maintain the inventory of the firm's printed marketing materials, brochures and premiums. Negotiate with vendors and order these items as necessary. These materials may include printed brochures, booklet covers and tabs, business cards, stationery, product sheets, premiums and other presentation materials.
- Plan and manage the firm's special events. Make all arrangements for these events including venue, catering, entertainment, flowers, invitations, and publicity. Develop and organize the agenda for each event to ensure the event is smoothly executed and all appropriate attendees are invited. Negotiate pricing with all vendors and monitor expenses to event budget.
- Distribute tickets to sporting events to existing and prospective clients and referral sources. Ensure the tickets are distributed in a timely manner.
- Confirm all marketing materials meet regulatory advertising requirements with the firm's chief compliance officer.
- Benchmark firm's marketing activities where possible. Report on social media analytics in conjunction the firm's marketing consultant. Coordinate client service and other marketing surveys when requested.

JOB REQUIREMENTS

Minimum 4-5 years of experience as a marketing manager, or similar position, in a financial services firm. Requires specialized knowledge of the wealth management industry plus expertise in marketing, social media and event planning. Ability to collect, analyze and calculate firm and finance data for use in firm marketing materials and reporting to outside consultants. Must have advanced knowledge of Microsoft Excel, PowerPoint, Word and Outlook and working understanding of CRM systems and portfolio reporting systems. Excellent written and oral communication skills are required as well as strong interpersonal and organizational skills. Minimum bachelor's degree. Must be team oriented, enthusiastic and able to work in a fast-paced, team environment yet think and work independently, set priorities, take initiative, and be available to work flexible hours when needed. Utmost discretion required.

Please respond to careers@badgley.com with resume if interested.