



JOB DESCRIPTION

DEPARTMENT: Marketing Team
POSITION: Marketing Production Assistant
REPORTS TO: VP, CCO and General Counsel

SUMMARY:

Assist with day-to-day Marketing projects with operational, production and digital aspects. This hands-on position involves maintaining current systems, measuring results, recommending improvements, and implementing changes that extend the Firm's marketing strategy, brand and messaging within regulatory constraint. The goal of the Marketing Team is to support the Firm's best-in-class marketing efforts in a highly collaborative method and meet its mission of providing outstanding client service.

ACCOUNTABILITIES:

- Assume primary responsibility for the execution of marketing collateral:
 - Create and update website, email, and social media marketing materials
 - Assist with video production
 - Produce product and client specific presentation books
 - Support the sales team with conference and event materials
 - Maintain files and materials in a manner consistent with regulatory standards
- Assist with the production of marketing efforts:
 - Remain highly attuned to the Marketing Team's workflow by maintaining a high level of organization, focusing on deadlines and processes, and adapting to quickly shifting priorities throughout the day
 - Identify innovative process modifications to increase efficiency and effectiveness of marketing pieces
 - Execute personal production deliverables
 - Verify data and information in regular marketing materials as well as outward facing databases
- Coordinate all aspects of various marketing projects:
 - Assist with design and content efforts
 - Apply necessary regulatory disclosures
 - Oversee internal and external routing processes
 - Ensure timely delivery of new materials by proactively communicating project status with key contributors
 - Assist with collection of data and metrics related to marketing materials
- Build strong cross-departmental relationships between Marketing, Investment Management, Legal/Compliance, Operations and Sales to ensure timely and quality deliverables and serve as the champion for marketing output by demonstrating leadership, accountability and effective communication across the Firm.
- Various other duties as assigned.

REQUIREMENTS:

- Associate or bachelor's degree in marketing or related field
- Experience in a similar role with financial products and services a plus
- Proven ability to meet deadlines, lead marketing execution efforts, and manage multiple projects simultaneously
- Solid interpersonal, oral, and written communication skills
- Desire and demonstrated ability to work in a collaborative and mutually supporting team environment
- Proficient in Microsoft Office
- CMS, CRM, and/or Adobe Suite experience a plus
- Familiarity with FINRA, SEC, GIPS regulations a plus
- Familiarity with Salesforce/Pardot a plus