



## **JOB DESCRIPTION**

DEPARTMENT: Marketing Production Team DATE: 6/22  
POSITION: Marketing Associate  
REPORTS TO: VP, CCO and General Counsel

### **SUMMARY:**

This hands-on position is primarily responsibility for producing marketing materials and for shepherding marketing projects through the production process, from initial concept through distribution. This role involves maintaining current systems, increasing marketing efficiency, and recommending improvements that extend the Firm's marketing strategy, brand and messaging within regulatory constraint. The goal of the Marketing Production 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:**

- Produce marketing collateral:
  - Create and update website, email, and social media marketing materials
  - Convert materials to HTML or other media forms to maximize content inquiries
  - Assist with video production
  - Produce product and client specific presentation books
  - Support the sales team with conference and event materials
  - Organize Firm-wide events and internal marketing campaigns
  - 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
- Coordinate certain aspects of various marketing projects:
  - Manage design and content efforts
  - Apply necessary regulatory disclosures
  - Oversee internal and external routing processes
  - Ensure timely delivery of new materials by proactively communicate project status with key contributors
- 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's or Bachelor's Degree in marketing or related field preferred
- 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, verbal, 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 and requirements a plus