BLBB Advisors
Marketing and Communications Specialist
Job Description

Position Title: Marketing and Communication Specialist
Reports To: Director of Brand Management
FLSA status: Full-time or Part-time/On-site

Position Summary:
Develop and execute marketing initiatives in collaboration with the Director of Brand Management that support firm-wide strategic plan. The Marketing and Communication Specialist will have strong technology skills with a focus on enhancing advisor communications through CRM usage, supporting client acquisition efforts, and building brand awareness within the high-net-worth and institutional investor communities. This position offers professional growth within a fast-paced financial services environment.

Responsibilities:

(1) Marketing Technology
- (a) Assist the Director of Marketing in leveraging technology that generate leads
- (b) Research/create thought leadership content for general and individual FA campaigns that resonate with the ideal multi-generational client base and attract referrals
    - (i) Track ROI of posts
- (c) Mastery of HubSpot functionality
    - (i) Audit current firm usage of software for full functionality and efficiency
    - (ii) Write copy for regular industry/client communications
    - (iii) Design invitation workflow (invite, landing pages, attendance capture)
    - (iv) Disseminate marketing content (Quarterly, Money Notes, Tear Sheets, etc)
    - (v) Maintain bridge between marketing CRM (HubSpot) and industry CRM (Sugar)
    - (vi) Capture engagement of contacts
- (d) Create and help monitor data analytics dashboards
- (e) Assist in monitoring website to remain current and responsive to client needs
- (f) Standard Website updates for arrivals, departures, changes in credentials or services offices, etc.

(2) Events
    (a) Coordination of annual client recognition event
        (i) Site selection
        (ii) Guest list and rsvp tracking
        (iii) Menu
        (iv) Theme
    (b) Assistance in on-site and virtual educational programming (CLE, CPD, CFP, PHR)
    (c) Collaboration with speakers and firm technology capabilities
    (d) New client/life event/introduction recognition gifts

(3) Department Administration
    (a) Actively participate in weekly marketing department meetings
    (b) Work intentionally within department budget
    (c) Maintain grab-and-go market content

Required Skills, Knowledge, and Abilities:

- Understanding of RIA business model and regulatory environment
- Excellence in written and verbal communication
- Strong attention to detail and ability to manage multiple projects over multiple timelines
- Collaborative team player with ability to work independently
- Working knowledge of most forms of social networks and digital media, especially LinkedIn
- Proficiency with WordPress, Publisher, PowerPoint, Excel, and Outlook
- Knowledge of website search engine optimization (SEO)
- Understanding of compliance requirements for financial services marketing
- Position requires a high level of confidentiality

Education and Experience:

- Bachelor's degree in marketing, business or related experience
- At least two years of experience with online marketing, including social media and content marketing
- Client Relationship Management software and marketing automation platforms, especially HubSpot
- Design of data analytics and metric dashboards
- Marketing software – CRM, HubSpot, LinkedIn, Canva, etc
- Investment industry experience preferred

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