BLBB Advisors
Marketing and Communication 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 supports 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:

- Marketing Technology
  - Assist the Director of Brand Management in leveraging technology that generates leads
  - Research/create thought leadership content for general and individual FA campaigns that resonate with the ideal multi-generational client base and attract referrals
    - Track ROI of social media posts

- Mastery of HubSpot functionality
  - Audit current firm usage of software for full functionality and efficiency
  - Write copy for regular industry/client communications
  - Design invitation workflow (invite, landing pages, attendance capture)
  - Disseminate marketing content (Quarterly, Money Notes, Tear Sheets, etc)
  - Maintain bridge between marketing CRM (HubSpot) and industry CRM (Sugar)
  - Capture engagement of contacts

- Create and help monitor data analytics dashboards
- Assist in monitoring website to remain current and responsive to client needs
- Standard website updates for arrivals, departures, changes in credentials or services offered, etc.

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

- Department Administration
  - Actively participate in weekly marketing department meetings
  - Work intentionally within department budget
  - 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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