



Director of Marketing & First Impressions (Full Time)

Local wealth management firm specializing in delivering holistic financial planning solutions to high net worth individuals is seeking a Director of Marketing & First Impressions. This person will be a very visible member of our team. The overall responsibility is to deliver extraordinary client service and the Director of Marketing & First Impressions must be professional, caring, and genuinely interested in making other people feel special and loved. The position is responsible for coordinating client events, delivering concierge services to clients, overseeing and developing client correspondence, and maintaining and enhancing our website and social media presence.

We are a growing and passionate firm and we have significant responsibilities and opportunities to impact our clients' lives for the better. Our Director of Marketing & First Impressions will be an integral part of that mission. As the first part of our mission says, "To empower our clients to realize their dreams and goals", we look for someone who has the innovation, intelligence, passion and personality to help our clients in pursuit of that mission.

FIRM MISSION STATEMENT

To empower our clients to realize their dreams and goals, by providing faithful advice and superior service, while executing financial strategies with patience and discipline.

MAJOR RESPONSIBILITIES

The essential functions of this position include, but are not necessarily limited to, those specifically identified in this description. The position and its essential functions may change over time and these changes may not necessarily be reflected in the position description. The Company may, at its sole discretion, add to, change, or expand the essential or marginal functions of the position.

- Greets clients and prospective clients in a friendly and sincere manner, making them feel comfortable when they visit the office.
- Handles incoming telephone calls.
- Sorts and distributes the mail.
- Coordinates all gifts and cards for clients.
- Oversees and develops all marketing materials, including print, web, audio, and video.
- Coordinates and creates articles and other content for newsletters and all other periodic client correspondence.
- Maintain and improve Furstenau Financial branding and marketing strategy.
- Oversee the design, layout, navigation, and content of all web sites.
- Develop and manage social media presence.
- Provide unique client experience through various marketing activities.



- Coordinate social and educational client events which include but are not limited to: acquiring sponsorship, determining event budget, coordinating food and beverage service, lining up speakers/presenters, creating event invitations and ensure follow-up with clients following events.
- Develop and maintain written systems for all activities.

INTERPERSONAL SKILLS:

This position requires an individual who presents a professional image, is highly organized, and has excellent oral communication and presentation skills. This individual has a keen eye for detail and maintains a professional image. The individual must be able to function efficiently and effectively in a potentially hectic environment while providing a stable presence. The position requires excellent interpersonal skills, extraordinary client service attitude, a genuine interest in people, and a passion to assist others.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Extreme attention to detail.
- Excellent interpersonal skills
- Excellent attitude and an extraordinary client service orientation
- A genuine interest in serving and caring for other people
- Excellent organizational and time management skills
- A burning desire to succeed
- An ability to handle multiple tasks and handle stress
- Knowledge of marketing, advertising, and public relations concepts in financial advisory arena to maximize company's professional image with clients and prospects.
- Superior writing skills—ability to convey messages in writing in a clear, persuasive manner.
- Ability to think creatively when developing marketing materials and concepts.
- Superior ability to communicate professionally, clearly, and accurately in both written and verbal communication with clients and business partners.
- Strong decision making and sound judgment—ability to listen and organize information and make intelligent and timely decisions with a sense of urgency.
- Demonstrated personal initiative and motivation to succeed.
- Strong attention to detail balanced with strategic thinking.

EDUCATION AND EXPERIENCE:

- Proficiency with website design, social media maintenance (Facebook and LinkedIn), and video editing software (Adobe or Final Cut Pro).
- Strong experience in both writing and editing copy for communications and marketing pieces.
- Proven experience using social media and SEO tools to cultivate a strong online presence.



- Ability to demonstrate previous success through personal portfolio.
- Industry experience is a must.
- Requires a degree (Bachelor's preferred) in Marketing, Advertising, Communications or related field
- Or 2-4 years related work experience in marketing, advertising, or public relations.
- Knowledge of finance, business, and insurance principles (helpful).

APPLICATION PROCESS:

- To apply: email resume and references to silver.sibert@lpl.com
- Or call 402-887-4302 for more information.