



# GENOVESE BURFORD & BROTHERS

TRUSTED WEALTH ADVISORS

**Position: Marketing Lead**

Dept.: Corporate

Location: Sacramento, CA office

Status: Non-Exempt, Full-time

Founded in 1987, Genovese Burford & Brothers (GBB) is a leading independent wealth management firm based in Sacramento, CA. We offer financial planning and investment management services to individuals, families, and institutions, and retirement plan services to businesses.

GBB is growing, and we are seeking a Marketing Lead (Mktg. Lead) to join our team. The Mktg. Lead will work closely with the COO and support staff to build GBB's brand engagement, as measured by the pipeline of leads and qualified prospects and by existing client identification with nurturing efforts. Secondly, the Mktg. Lead will undertake brand awareness projects to complement existing broadcast media efforts. **This role is for a "doer," not for someone whose modus operandi is to lead and to delegate front line work to other team members.** The person in this role must be able to lead work across a range of marketing activities as outlined below. The person in this role must fit our culture of integrity, teamwork, and putting clients' interests first.

This role reports to the Chief Operating Officer (COO) and works closely with our Marketing Committee. The Marketing Lead's mission is to build a database of email and telephone numbers corresponding to contacts who are favorably inclined toward GBB and to whom subsequent marketing efforts can be directed. While there will be clear prioritization among projects and a focus on only so many efforts at a time, primary responsibilities may include the following, among others:

- Digital Advertising
  - Lead and execute the firm's current projects in SEM and SEO.
  - Evaluate and implement new digital advertising channels (e.g. FB ads, domain specific banner ads, geo-targeted banner ads, retargeting).
  - Assist with the submission of copy, logos, etc. for advertising purposes.
  
- Content Marketing
  - Maintain the company editorial calendar by tracking progression of content from assignment to posting.
  - Update firm website with pertinent and timely information in an SEO friendly way.
  - Assist in editing and delivery of external communication including email blasts, newsletters, white papers, webinars, and blogs.
  - Draft public and media relations content. Cultivate media contacts.
  - Design and execute social media post tactics and incorporate social media into marketing campaigns as appropriate.



# GENOVESE BURFORD & BROTHERS

TRUSTED WEALTH ADVISORS

- Ensure messaging is consistent with the company's brand and core values.
- Campaigns and Event Planning
  - Develop and implement cost effective marketing strategies based on a thorough understanding of GBB's services and target markets.
  - Take ownership for overall marketing campaign program management; developing, executing, measuring and reporting campaigns.
  - Make recommendations for future projects and campaigns based on analysis of measures of effectiveness from previous campaigns.
  - Support internal marketing efforts to educate co-workers on GBB messaging.
  - Implement client and prospect events including guest lists, invitations, sponsor communications, vendors, event staffing, and budgets.
- Collateral Development
  - Draft, maintain, and communicate to team members the range of descriptive materials available for use with prospects, clients, and centers of influence.
  - Support new business development efforts with presentation drafting and templating and collateral creation.
- Reporting
  - Create and implement, along with the Ops Lead, a work flow in the firm's CRM for reporting of lead generation and new business development outcomes.
  - Choose KPIs and standards to evaluate the efficiency and effectiveness of particular marketing efforts.
  - Create, populate, and update, internal KPI dashboards and communicate to appropriate sets of co-workers.
  - Track, update, and manage program cost to budget.
  - Communicate with and report out to COO and Partners with appropriate frequency.
- Client Nurturing
  - Assist in gathering client survey data and communication of results internally.
  - Support efforts to improve the client experience and to make those improvement efforts more clearly apparent across the client base.
- Technology Platform Management: With the Ops Lead, execute the firm's marketing technology strategy and lead the firm's marketing technology activities, both for optimizing current systems and implementing new systems.
  - Make recommendations to the Marketing Committee and then Wealth Mgmt. Ops. Committee on technology platform improvements and enhancements, in line with company objectives. Keep up with a constantly evolving marketing technology landscape.



# GENOVESE BURFORD & BROTHERS

TRUSTED WEALTH ADVISORS

- With Ops Lead, set appropriate timelines and deliverables for implementing those platform enhancement projects.
- Lead the processes for vendor selection, communicate with Marketing Committee and Wealth Mgmt. Ops Committee to facilitate decision making, and build and maintain productive relationships with those vendors.
- Conduct ongoing training in use of systems, and educate users on new features and best practices. Be the go-to person for questions and issues with our marketing technology platform.

Minimum requirements for consideration for the Mktg. Lead role are:

- Resume and cover letter
- Clean criminal and regulatory record
- High school diploma or equivalent

Strong candidates will offer the following:

- Bachelor's degree from an accredited college or university
- 3-4 years of work experience relevant to business-to-consumer marketing, preferably for financial services or professional services firms; some degree of financial fluency
- Superior skills in writing, editing and content creation
- Experience in drafting content for web, broadcast, and advertising uses
- Industry knowledge: current on industry developments and marketing technologies that can be leveraged to help the firm compete and drive profits
- Excellent problem-solving skills and the ability to work independently or with a team to troubleshoot issues that arise with campaigns and work processes
- High level of organization and attention to detail
- Track record of self-starting and an ability to prioritize tasks and advance multiple projects simultaneously
- Strong communication skills and a proven ability to manage change across multiple functional areas
- Service orientation
- Team player, collaborative, able to work with others
- IT skills – Word, Excel, PowerPoint, Google Analytics, Google AdWords, marketing automation, social media, and CRM software skills a plus

GBB offers competitive compensation, commensurate with experience. Genovese Burford & Brothers is an equal opportunity employer. For more information, visit us at <http://gbbwealth.com/careers>.