VIGILANT Capital Management, LLC

JOB DESCRIPTION

JOB TITLE: Marketing Manager

LOCATION: Primarily based in Portsmouth, NH office, with regular ongoing travel to Portland, ME office

EMPLOYMENT CLASSIFICATION: Full-time, exempt employee

ESSENTIAL JOB FUNCTIONS:

- **Marketing**
  - Drive the marketing efforts of the Firm in order to successfully attract new business opportunities, generate new client assets, cultivate referral sources, communicate with existing clients, and promote a high-quality image within our target demographic and geographic markets
  - Work with the Partner-in-Charge (PIC) to develop procedures and bring organizational structure to marketing and sales processes, actively bring marketing and sales related ideas and opinions to PIC/Executive Committee (EC), and implement best practices
  - Facilitate meetings, at least weekly, with PIC to advance marketing and sales initiatives
  - Be an active/contributing member of the Firm's Marketing Committee, ultimately serve as the committee chair
  - Responsible for the overall look, feel and composition of the Firm's outward-facing communications
    - Drive the design of the Firm's marketing materials and the preparation thereof, keeping up-to-date hard copies on hand as needed for COI/prospect meetings
    - Be the point person for the Firm's digital strategy and presence, including website and social media
    - Create marketing content and coordinate the details around firm press releases and publications in which the firm is mentioned
    - Work with visual communications vendor(s) for various printing needs, including business cards, note cards, birthday cards, holiday cards, announcements, etc.
  - Disseminate various work products to appropriate parties (clients, prospects, COIs, those within our broad network), including but not limited to:
    - market commentary produced by the Chief Investment Officer (CIO), as well as the recording and posting of investment seminars
    - wealth planning materials produced by the Firm's Wealth Advisors
    - compliance related information, as necessary and directed by our Chief Compliance Officer (CCO)
    - cyber-security related information, as necessary and directed by our Investment Operations Manager
  - Represent and promote the Firm's mission and brand by attending civic/community events, as appropriate
  - Maintain an up-to-date awareness of industry trends and the competitive environment

- **Sales**
  - Participate in the design, creation and implementation of:
    - the Firm's sales strategy, encompassing both organic and referral efforts
    - annual and quarterly sales goals at the Firm and individual levels
    - sales-related business plans, including goals for COI activity, lead, prospect and new client generation, and applicable budgeting
  - Track all sales-related activity and all costs associated therewith, in order to determine effectiveness of business plans and the personnel responsible for generating new business; prepare reports for PIC/EC
  - Meet regularly with individuals/teams responsible for new business to review effectiveness and communicate results with PIC
  - Track activity and results in an effort to understand efficacy/profitability of both organic and referral sales efforts
  - Be an active/contributing member of the Firm's Sales Committee, prepare reporting for bi-monthly Sales Committee meeting
  - Consider and participate in design of appropriate sales-training techniques and initiatives, including the evaluation and selection of external resources, if applicable

- **Event Coordination**
  - Proactively monitor upcoming events and review corporate memberships to identify hosting and sponsorships opportunities, understanding the interests and hobbies of clients and COIS, align efforts with the appropriate Managing Director (MD)
  - Work closely with MD to ensure the Event Planner Form is completed, the event has approval from EC, and certain target attendees have committed
  - Drive the event coordination process by staying ahead of crucial deadlines, arranging all details with regard to venue, caterer, invites, RSVPs, etc., communicating progress to MD and other team members as needed, and reflecting all events in appropriate calendars
  - Create and track all activities associated with firm marketing events (campaigns)
  - Participate in post-event debriefs to review event details in order to determine areas of success and improvement, and implement for future planning
  - Become a resident expert with the Firm's Client Relationship Management (CRM) software, determining the most effective methods for inputting and extracting marketing and sales related information in report form

- **Miscellaneous**
  - Participate in additional firm committees, as needed
  - Other miscellaneous tasks and responsibilities, where the above list is not intended to be all-inclusive

KNOWLEDGE, SKILLS AND ABILITIES:

- Ability to use marketing initiatives to drive sales at an organization level
- Understanding of brand building, both at the individual and firm levels
- Knowledge of methodologies by which an entity communicates with its clients, prospective clients and referral sources (COIs)
- Ability to track marketing and sales activities and costs in order to understand and demonstrate return on investment for such activities

- Social media savvy, both in strategic and tactical manners
- Excellent interpersonal skills and professionalism
- Develop good working relationships across organizational functions, position continually requires poise, tact and diplomacy
- Meticulous attention to detail, particularly as it relates to composing and proofing materials
- Strong oral and written skills
- Well-developed presentation skills
- Ability to work both in a team-oriented environment and independently
- Ability to effectively manage time, establish priorities, meet deadlines and multi-task in a fast–paced environment
- Resourceful, analyzing and solving problems in a self-reliant, proactive manner
- Intermediate to advanced skills across the Microsoft Suite – Excel, PowerPoint, Word, Outlook
- Knowledge of or an aptitude for learning the Tamarac Suite (CRM and portfolio accounting software), and Schwab Institutional's website
- Ability to work beyond standard office hours and attend offsite events, as necessary
- Ability to travel between offices, typically in Maine and New Hampshire

EDUCATION AND EXPERIENCE:

- Bachelor's degree, preferably in marketing, finance or business
- Minimum of 3 years marketing-related experience
- Experience with CRM software desired
- Experience with schwabinstitutional.com a plus

Interested applicants should submit their cover letter and resume to careers@vigilantcap.com.