

## // Institutional Marketing Specialist

### Job Description

The Institutional Marketing Specialist will drive marketing initiatives and programs to support business growth and capture competitive product/brand positioning within broker-dealers, banks, and wirehouses. Research, write and bring to market WealthVest thought leadership content, white papers, and consumer brochures. The Institutional Marketing Specialist will utilize emails, webinars, salesforce.com, social media, web, blog and other forms of marketing to create a comprehensive marketing strategy. Work closely with key accounts to ensure we are abiding by and updating SF.com for firm marketing rules including, but not limited to: do not email firms, prior approval firms, and marketing programs.

- / Design and implement comprehensive marketing campaigns utilizing a variety of deliverability methods including emails, webinars, videos, podcasts, white papers, social media and point of sales pieces designed to highlight the new brand initiatives
- / Support key accounts with broker-dealer and bank national conferences marketing
- / Work across departments including, key accounts, sales, operations, finance, IT and marketing to ensure institutional marketing campaigns are communicated effectively throughout the organization
- / Manage efforts about content and brand development
- / Adapt to different company objectives throughout the work week
- / Ensure marketing material abides by WV brand standards and is aesthetically pleasing

### Compensation and Benefits

- / Competitive Salary
- / Health insurance, dental insurance, and vision insurance benefits
- / Matching 401(k)
- / Quickly growing start-up with the opportunity to grow with the firm
- / Over 30 days of paid time off in the first year
- / Casual dress code
- / Beautifully located at the base of the Bridger Mountain Range



## // Desired Skills & Experience

- / 3 - 5 years of professional experience
- / Bachelor's Degree or equivalent required
- / Excellent written and verbal skills
- / Committed to flawless execution
- / Ability to integrate across teams and departments
- / Strong attention to detail
- / Proficient in Microsoft PowerPoint, Excel and Word
- / Demonstrated critical thinking and problem-solving skills
- / Strong interpersonal and teamwork abilities
- / Basic understanding of financial markets, financial services, and retirement planning is beneficial
- / Experience in applying content development to brand-building initiatives is beneficial

## // About WealthVest

WealthVest, based in Bozeman, is an advanced B2B financial services distribution firm that specializes in high-quality fixed and fixed index annuities. Over 10,000 baby boomers are retiring daily, and to prepare for retirement, Americans have purchased \$14 trillion in mutual funds and annuities to ensure their golden years. WealthVest designs, markets and distributes these essential building blocks of retirement savings for financial professionals throughout the Nation.

Send your resume and cover letter to Andrew Keizer at [akeizer@wealthvest.com](mailto:akeizer@wealthvest.com) or give him a ring at **406-219-0347**

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