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## **Job Description: MARKETING & COMMUNICATIONS SPECIALIST**

**Job Title:** Marketing & Communications Specialist

**Date:** 12/3/18

**Reports To:** Marcia Zappa

**Direct Reports:** 0

**FLSA Status:** Exempt

### **Summary Description & Primary Role**

The ideal Marketing and Communications Specialist is a well-rounded individual excited to take on the versatile challenges of being part of a small, in-house marketing team. This person is self-motivated and self-managed, excited to take ownership of daily tasks as well as larger projects. The ideal Marketing and Communications Specialist is a team player, willing to learn, teach, and collaborate. The Marketing and Communications Specialist works closely with the Director of Marketing and Communications to implement the marketing and communications efforts of Affiance Financial and its advisors. Essential responsibilities include, but are not limited to, all print and digital, internal and external communications, advertising, branding, and event planning.

### **About Our Company**

Affiance Financial, located in St. Louis Park, Minnesota, is a registered investment adviser (RIA) offering broad-based financial planning services to its clients. Affiance conducts its business according to the highest ethical and professional standards, consistent with all applicable statutes, rules, regulations, and internal procedures. We customize our financial planning services based on client needs and circumstances. For a given client this may include, but is not limited to, retirement planning, estate planning, insurance planning, investment planning, tax planning, and college planning.

### **Essential Responsibilities:**

- Work with the Director of Marketing and Communications to develop the firm's overall marketing strategy.
- Maintain the firm's website including updating pages and posting blog articles and event information.
- Manage and implement the firm's social media strategy.
- Coordinate the dissemination of the firm's client communications including newsletters, emails, and event invitations.
- Help design the firm's internal and external communications including the website, newsletters, emails, event invitations, brochures, handouts, and advertisements.
- Help write and edit the firm's internal and external communications including web content, newsletters, emails, event invitations, brochures, handouts, and advertisements.
- Follow, police, and update the firm's brand guide as needed.
- Maintain an inventory of branded giveaways.
- Track, record, and communicate project status updates with the Director of Marketing and Communications.
- Perform all necessary compliance activities including obtaining proper approval for all marketing and communications materials and maintaining digital and physical copies of all approved materials.
- Help plan staff and client events including, but not limited to, webinars, educational seminars, business development events, and appreciation events.
- Maintain an inventory of branded stationery.

- Send out gifts and cards to clients as requested.
- Support the advisors with sales activities as needed.
- Support the firm's community engagement as needed.

### **Qualifications Required**

To perform this job satisfactorily, an individual must be able to perform each duty and responsibility as described. The qualifications and requirements listed below are representative of the knowledge, skills, abilities, and physical demands required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Education and Experience:**

- Associate or bachelor's degree in Marketing, Advertising, Communications, or a similar field.
- One to five years professional marketing and/or communications experience.

### **Knowledge/Skills/Abilities:**

- Proficient with Adobe Creative Suite.
- Proficient with Website platforms, such as Wordpress, and Social Media, such as Facebook and LinkedIn.
- Proficient with Microsoft Office Suite.
- Strong verbal and written communication skills.
- Self-directed and confident, with the ability to think critically and solve problems.
- Thorough and accurate, with strong attention to detail.
- Collaborative team player.
- Professional demeanor.
- Positive attitude.
- Customer service orientation.

### **Certification, License, and Registration:**

- Valid driver's license.

### **Compensation and Benefits**

- Competitive salary-based structure commensurate with experience.
- Firm-sponsored medical, dental, disability and life insurance, with annual employer contribution to Health Savings Account.
- 401(k) Profit-Sharing Plan with a generous employer contribution.
- Paid holidays and personal days, in addition to an optional Summer Hours program.
- Reimbursements for continuing education and other pertinent higher-education programs.
- Matching gift program. We're committed to giving back to our community for worthy causes.
- Complimentary investment management and financial planning services.
- Company gatherings and events.

### **Working Conditions and Physical Requirements**

The position is situated in a professional office environment. While performing the duties of this job, the employee is regularly required to speak and listen. The employee is frequently required to walk, sit, stand, reach and use hands in an articulate manner. Specific vision abilities required by this job include close vision, color vision, peripheral vision, depth perception, and ability to adjust focus. The position does not require an individual to regularly lift items over 25 lbs.

**Disclosures**

This job description does not list all the duties of this position. The Marketing and Communications Specialist will be asked by leadership to perform other duties. This individual will be evaluated, in part, based on his or her performance of the responsibilities listed in this job description. Leadership has the right to revise this job description at any time. This job description is not a contract for employment, and either the employee or Affiance may terminate employment at any time, for any reason.

**Contact**

Please email your resume to [erin@theinstinctiveadvantage.com](mailto:erin@theinstinctiveadvantage.com).