

Are you an ambitious, passionate professional? Would you like the opportunity to play a significant role within a growing and dynamic organisation? We are seeking a qualified candidate to join our niche wealth management firm as Marketing Manager.

Reporting to a Partner, the successful candidate will be responsible for the vision, execution, implementation and on-going maintenance of the firm's Strategic Marketing Plan. The candidate will also be responsible for the chairing and running of the Marketing Strategy Committee.

The ideal candidate will be degree educated and have at least 5 years' experience of working in the marketing team of a financial services organisation. Wealth Management experience is preferred, although not essential.

The role requires an individual who is able to interact with staff at all levels in a fast-paced environment, while also being flexible, proactive and resourceful. A high level of professionalism and confidentiality is crucial to this role. Expert written and verbal communication skills and attention to detail are equally important.

About MASECO Private Wealth

MASECO Private Wealth offers a holistic wealth management approach in developing and implementing tax efficient global wealth and asset management strategies for US persons who are non-domiciled in the UK. With more than a decade of experience in providing cross-border US Wealth Management services, MASECO employs leading global investment strategies and solutions that are both tax efficient and compliant.

Our Values

MASECO Private Wealth was founded in 2008 in the wake of the non-domicile tax rules being introduced in the UK. The Partners had previously developed the US/UK private client desk within a large Private Bank in London. They realised that as a result of these legislative changes, a different approach would be required to service the needs of US citizens living in the UK. The alternative structure needed to remain not only tax-efficient and cost effective for American individuals living in the UK but would also need to be built upon global best practices. Just over 10 years later, MASECO oversees over \$1.5 billion in assets for approximately 600 families.

MASECO is proud to be the UK's first financial services B Corporation member. B Corp is an alternative vision of the role of business in society. It is an assertion that businesses can benefit shareholders whilst also solving social and environmental problems. We want to influence the way investing and charitable giving are viewed in both the financial and wider communities, and to promote the standards of accountability that being a B Corp member represents. www.bcorporation.net

What we do

MASECO develops and implements global, tax-efficient wealth strategies for families, trusts and foundations based in the UK, USA and internationally. Our aim is to deliver expert advice, designed to simplify and tackle the complexities associated with cross-border wealth management. We deliver comprehensive wealth management and investment advice to clients based on trust and open communication. Our mission is to guide families with cross-border economic interests to a meaningful financial future. MASECO's Wealth Management equation provides a framework for the delivery of a systematic wealth management offering:

Authenticity



Teamwork



Pursuit of Excellence



Empathy



Mastery



Specific duties and responsibilities include:

- Take full responsibility for the vision, execution, implementation and on-going maintenance of the firm's Strategic Marketing Plan (SMP).
- Responsibility for the chairing and running of the Marketing Strategy Committee.
- This will include defining the tools needed to deliver the SMP and identifying, negotiating and liaising with any third-party providers required to fulfil any part of the plan
- Manage the relationship between MASECO and any third-party providers of services to the Marketing department, for example our external web agency.
- Report progress of the Strategic Marketing Plan to the management group. Work with the management team and finance team to set and manage the annual marketing budget.
- Provide the Management Team with Marketing and Business Development data.
- Monitor and report on effectiveness of marketing communication initiatives and campaigns.
- Manage the digital advertising and marketing campaigns for the firm.
- Work closely with the Business Development Committee to understand their goals and ensure Marketing works alongside to ensure that business development initiatives are provided with the appropriate tools and support.
- Manage and develop the firm's sponsorship campaigns
- Organise and oversee annual client events and adhere to the yearly event budget.
- Work closely with the investment and wealth planning teams to develop thought leadership materials and help to build multi-media content – (text, video, podcasts and webinars) across multiple marketing channels to targeted audiences (clients/prospects/intermediaries).
- Responsibility for creating, editing and releasing press releases and, when appropriate, managing relationship with Press or PR agency.
- Develop and oversee the firm's awards strategy to ensure industry leader recognition.
- Responsible for the development and maintenance of Marketing Processes and Procedures to deliver productivity enhancements across the organisation.
- Manage and co-ordinate the firm's central marketing systems activity including dot-digital, HubSpot, Google Analytics, Microsoft Forms and Adobe Creative Suite.
- Ensure all supporting documentation is maintained as per company procedures.
- Ensure that marketing initiatives (as listed above) are focused on maximising client interaction.
- Ensure that marketing initiatives (as listed above) maximise the development of client leads for the business.
- Continued analysis of competitive environment to ensure MASECO remains a market leader.

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Skills and specifications for the role:

- Bright, articulate and able to react quickly to different situations.
- The ability to act independently and run the Marketing Team.
- The ability to prioritise and execute effectively on deliverables
- A natural ability to innovate, develop and execute on marketing strategies.
- Naturally inquisitive and forever applying best practices whether in this industry or others to in order to continually improve the firm's Strategic Marketing Plan.
- Excellent design skills with experience using Microsoft and Adobe software.
- Excellent copywriting skills.
- Excellent interpersonal skills.
- Team management skills.
- Detail orientated & well organised.
- Tactful, trustworthy, diplomatic.
- Deploy assertiveness skills when appropriate.
- Ability to converse well on all levels.

Experience requirements:

- Degree educated – Minimum 2:1
- 5 years' experience of working within a marketing team of a financial services organisation
- Strong CRM experience

The base compensation is per annum and a discretionary bonus plan and competitive benefits plan is offered.

The closing date for applications is open ended. Please submit your CV with a covering letter to hr@masecopw.com.

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Data Protection Notice

MASECO LLP is dedicated to protecting the confidentiality and privacy of personal data entrusted to us. We comply with all relevant data protection laws, including the EU General Data Protection Regulation (GDPR). Please read the notice below in conjunction with the firm's Data Protection Policy which can be found on our website.

Legitimate Interest

In providing us with your CV you agree that we will use the personal data within that document for the purposes of assessing your suitability as a candidate for the specified role and, accordingly, we have a legitimate interest in such data. The personal data we use includes:

- Your name and personal details (including contact information, such as your primary and other residential address; your email address; your personal mobile telephone number or landline; your unique tax identifier (such as your National Insurance number); your driving licence and/or passport details;
- Your date of birth and/or age;
- Financial details, such as your current salary;
- Education and employment details.

Consent

By providing us with:

- your personal data, you consent to our using that personal data to perform checks with credit reference or fraud prevention agencies which may include obtaining information on you from other sources, such as the electoral roll, court records of debt judgments and bankruptcies and other publicly available sources as well as information obtained through social and other media, such as LinkedIn; and
- any sensitive personal data (such as your racial or ethnic origin or data concerning your physical or mental health or gender orientation), you are agreeing to our processing of that data for the purposes of assessing your suitability as a candidate for the specified role.

Retention

If you are not successful as a candidate for the particular role for which you apply, we will typically retain your personal data and other information you have provided to us or we have obtained about you in the course of the job application process for a period of up to 12 months from the date on which the job vacancy has been filled. If you would prefer that we remove your information from our records prior to this date, please contact us, however, we will continue to hold any information which we are required to retain under applicable laws and regulations. Should we wish to hold information about you, including personal data, for a longer period of time, we will seek your consent.

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