

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 the Managing Partner, the successful candidate will be responsible for the execution and on-going maintenance of the firm's Strategic Marketing Plan.

The ideal candidate will be degree educated and have at least 5 years' experience of working in a 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 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 under 10 years later, MASECO oversees over \$1.5 billion in assets for approximately 550 families.

Our Values

MASECO has a core set of values that form the foundation of everything we do. This translates into behaviour that is consistently applied and communicated both internally among our employees and externally among our clients. We strive to provide a Phenomenal Client Experience and seek to work with individuals and intermediaries who understand and appreciate our DNA. We believe that as an organisation we have multiple responsibilities – to our clients, our employees, our suppliers and to the world around us. MASECO strives to ensure that decisions are made with these responsibilities in mind. As such we attained B Corporation status and were one of the first wealth management firms in the UK to achieve this certification. The certification confirms and emphasises our commitment to look beyond the traditional model of capitalism when making decisions that affect others.

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:

Wealth Management = Investment Management + Wealth Planning + Relationship Management

Authenticity



Teamwork



Pursuit of Excellence



Empathy



Mastery



Specific duties and responsibilities for this role will include:

- Take full responsibility for the execution and on-going maintenance of the firm's Strategic Marketing Plan.
- Responsible for the continued development and execution of the Strategic Marketing Plan (which will include defining strict target market objectives) and ongoing progress reporting.
- 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.
- Managing the relationship with external web and design agency.
- Manage the digital advertising and marketing campaigns for the firm.
- Work closely with the Sales Team to understand respective departmental goals and ensure they are provided with the appropriate tools for business development.
- 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 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 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 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.

Skills required 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 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

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- 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 per annum is contingent upon proven experience, in addition 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 Alexandra.McWalter@masecopw.com.

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Data Protection Notice for Job Specifications

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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