

ONEWEALTH, LLC

BUSINESS DEVELOPMENT & MANAGEMENT

1954 AIRPORT ROAD, SUITE 230
ATLANTA, GA 30341

JOB REC: OWLLC March 2022 Marketing and Operations Role for the OneWealth family of Companies.

JOB TITLE: Associate (Marketing and Operations Manager)

JOB DESCRIPTION:

The **Marketing and Operations Manager** role serves two functions: a marketing component and an operation component. The marketing function involves:

- the timely execution of current marketing campaigns;
- coordination, development, and implementation of new campaigns and calendars for internal and external clients;
- design, production, distribution/delivery of digital and print marketing, advertisements, and presentation materials.

The operations function involves:

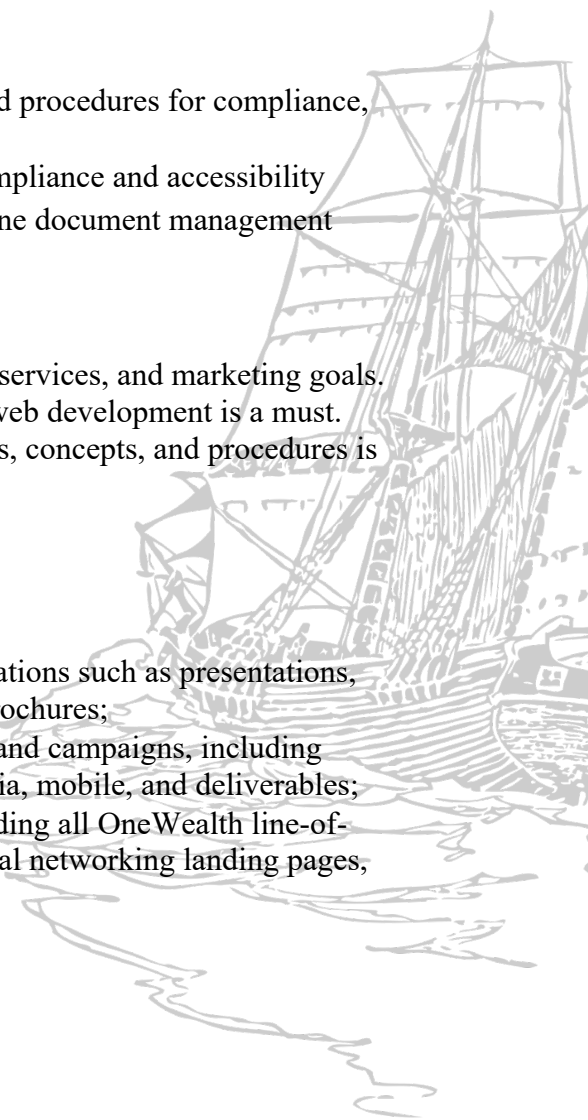
- documentation of sales and marketing related processes and procedures for compliance, efficiency, and client service purposes;
- maintenance of company data in company software for compliance and accessibility purposes software (e.g. CRM, client portals, and other online document management systems);
- administration of various client and staff calendars.

This role requires an in-depth knowledge of OneWealth products, services, and marketing goals. Proficiency in graphics, web advertising, social media, and basic web development is a must. Familiarity and experience with a wide range of company practices, concepts, and procedures is required to accomplish identified marketing and operational goals.

Specific Duties and Responsibilities:

- developing, managing and designing layouts of communications such as presentations, newsletters, event support materials, digital content, and brochures;
- planning, development, and execution of digital programs and campaigns, including online advertising, website strategy and design, social media, mobile, and deliverables;
- leading ongoing management of digital touch points, including all OneWealth line-of-businesses' web presence (home page and sub-pages), social networking landing pages, and mobile;

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- managing digital agency relationships, day-to-day production, as well as campaign budgets and schedules;
- maintaining site analytics, metrics, and campaign reporting. (In depth knowledge of SEO and AdWords programs desired);
- developing and coordinating multimedia packages.

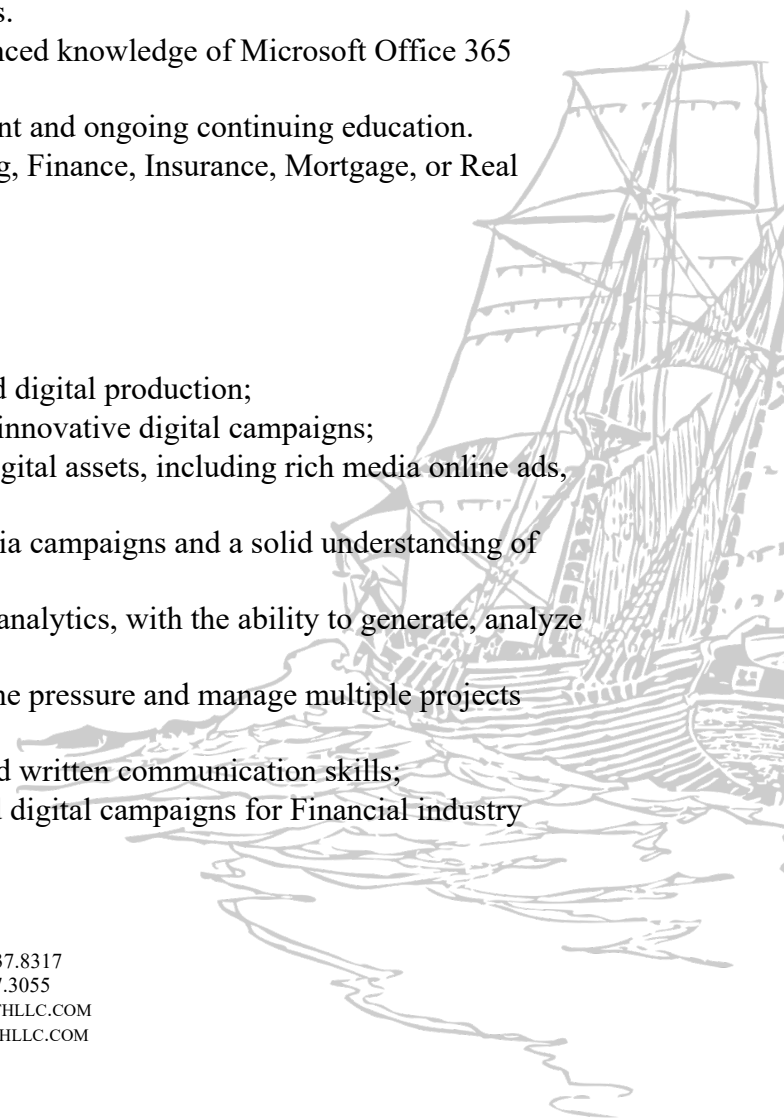
Minimum Qualifications:

- Valid Driver's License and clean criminal record.
- Bachelor's degree (Degree in Marketing related field desired but not required.)
- Able to work effectively independently and in teams.
- Effective oral and written communication skills.
- Ability to interact with people and make public presentations.
- Ability to maintain accurate records and protect client data.
- Efficient time management skills.
- Efficient analytical and organizational skills.
- Technically proficient with computer-advanced knowledge of Microsoft Office 365 preferred.
- Desire for constant professional development and ongoing continuing education.
- Knowledge and experience in Law, Banking, Finance, Insurance, Mortgage, or Real Estate.

Desired Skills & Experience:

- deep understanding of digital marketing and digital production;
- proven experience delivering effective and innovative digital campaigns;
- proven experience delivering a variety of digital assets, including rich media online ads, micro sites, and social media applications;
- experience managing successful social media campaigns and a solid understanding of social marketing;
- solid understanding of web metrics, digital analytics, with the ability to generate, analyze and interpret data;
- must be able to work under constant deadline pressure and manage multiple projects across multiple lines of business;
- strong management skills, excellent oral and written communication skills;
- experience delivering compliance-approved digital campaigns for Financial industry products and services;

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- proficient with Adobe Photoshop, Illustrator, InDesign, MSPublisher, GSuite Apps, HTML, HTML 5, CSS or similar.

Compliance/Licensure Requirement:

All OneWealth Associates must obtain FINRA Series 65 or 66 securities licensure within 90 days of employment. Training, testing, and license provided at company expense.

Compensation:

- Part-time, non-exempt, hourly position;
- Fully accountable reimbursement plan for mileage if tasks require travel;
- Opportunity to participate in company incentive compensation plan and profit sharing (401k) plan after one year employed.
- Opportunities for advancement include paid continuing education, internal lateral moves and promotions upon acquisition of professional credentials and/or appropriate licensure.

Company Description:

The OneWealth family of companies provides clients a comprehensive suite of financial, advisory, and management services to business owners, individuals, and families. The OneWealth family of companies includes a Business Advisory Practice, a Registered Investment Advisor, an Accounting and Tax practice, a Real Estate Brokerage, Independent Insurance Broker, and Independent Mortgage Broker.

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