

## **Marketing Specialist**

### **Well Lived Wealth, LLC.**

We're looking for a very "special package of talents" –

- A communicative individual who exudes confidence
- A person who possesses the "social gene"
- Someone who naturally nurtures essential relationships
- A hard worker who will find new clients and turn them into raving fans
- A professional in dress and demeanor – someone who "looks the part" and is comfortable dealing with affluent clients and the attorneys and CPA's who serve them

About us: Our firm, located in Houston, TX, specializes in wealth management for affluent individuals and business owners. Our team is friendly, respectful, collaborative, and professional. We focus on only one thing – helping our clients achieve their goals. Each member of our team plays a specific role in meeting this objective. The role of the Marketing Specialist is to help find and keep our clients and manage the prospect pipeline.

#### Responsibilities:

- Create and implement annual marketing plans with lead advisors
- Develop collateral materials and/or work with vendors
- Prepare, disseminate, and follow-up on press releases
- Develop client communications
- Develop referral leverage lists
- Manage website content and social media posts
- Perform prospect research
- Track pending prospect activity
- Coordinate client appreciation events and gifts
- Coordinate charity activities
- Assist with meeting preparation
- Host client meetings
- Coordinate client meetings
- Be a Well Lived Wealth cheerleader!

Qualifications:

- 5+ years of marketing experience is a plus
- Superb social/communication skills – you enjoy talking to people and building relationships
- Strong marketing/outreach skills
- Self-directed and resourceful
- Ability to prioritize projects and follow through
- An understanding of social media and audience engagement
- Bachelor's degree
- Experience in financial services, securities registration and insurance license, a plus

We offer an extremely competitive salary, a genuine career path and an opportunity to put your talents to work in a career you love. Please e-mail your resume and salary history to:  
[Molly@WellLivedWealth.com](mailto:Molly@WellLivedWealth.com)