



Position Description

Title: Marketing and Business Development Manager (MBDM)

Location: Lexington (Preferred) / Candidates from Greater Cincinnati / Louisville will also be considered

Department: Operations

Status: Full-Time

Job Summary

The Marketing and Business Development Manager role is best described as a *facilitator* of new business activity. The individual able to excel in this role will be critical to the firm's ability to increase market share in each division and geographic market and will have every opportunity to enjoy a long and successful career with the firm.

The MBDM will be responsible for development and execution of appropriate marketing campaigns utilizing a variety of marketing methods ranging from the traditional community relationship and center of influence development and nurturing to coordination of digital marketing campaigns and use of social media as appropriate. These marketing campaigns will be executed on a firm-wide as well as an individual advisor basis.

The MBDM will not be involved in providing professional services or making specific sales presentations to prospects or clients of the Institutional or Wealth Management Services divisions.

Duties and Responsibilities

This role can expect to focus their work in the following areas:

- MBDM will coordinate the development, implementation, and ongoing evaluation of the success of an Annual Marketing Plan. The plan should be developed in line with the specific sales strategies and tactics developed as part of overall MCF business planning. These plans are developed with much collaboration with members of the leadership team and individual financial advisors of the Institutional and Wealth Management Services divisions.

MCF

a fiduciary partner

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- MBDM will coordinate with other members of MCF team, outside vendors and partners to ensure advertising and marketing materials and programs are executed and delivered according to specified quality and within budgeted time and financial expectations. MCF has an internal resource to execute marketing content distribution, create certain deliverables, and support current overall marketing efforts. The successful individual in this role should have excellent experience with digital marketing tools and must be able to develop and monitor key performance indicators and remain accountable for overall program performance.
- MDBM will work closely with firm leadership and individual financial advisors to develop and maintain effective sales strategies and processes. They will ensure the plans and programs are carried out as designed and develop and implement methods to measure success for the firm in total as well as individual financial advisors.
- MBDM will assist financial advisors in understanding and analyzing their sales activity and implementing processes to measure progress toward achieving their new business goals.
- The MBDM will establish and maintain relationships with members of the community and centers of influence to create a consistent referral pipeline and opportunities to introduce appropriate financial advisors into new relationship/business opportunities.
- The role will involve consistent use of the client/prospect intelligence database and customer relationship management (CRM) software.

Qualifications

This role requires the following qualifications:

- Bachelor's degree.
- Ten or more combined years of marketing and business development experience.

This position is a "facilitator" role that is focused on developing relationships and leads which result in getting the talented financial advisors of MCF in front of the



right targeted prospects but must be willing to make the direct ask for the meeting or the referral.

- Must have experience in development and execution of traditional as well as “new age” marketing campaigns.
- Experience with customer relationship management (CRM) software and prospect database management.
- Ability to develop both high level strategic and boots on the ground tactical sales plans.
- Ability to maintain high level of confidentiality.
- Strong planning and organization skills.
- Must work well in a fast-paced, action-oriented environment where priorities change and time frames are critical.
- A very high level of self motivation and ability to both envision as well as ensure completion of projects.
- Very strong work ethic.
- High energy, upbeat, and generally warm personality.
- Excellent communication skills with ability to be exceptional listener as well as speaker.
- Competitive and performance driven – should have consistently been a top performer in their organization.
- Excellent Team Player with effective leadership skills. While there are no direct reports leadership is required in the collaboration with Division Managers and Executive Team. Must want to get to know individual advisors as individuals and persons and be flexible in developing sales plans that while broad enough for firm wide execution are also unique enough to accommodate the individual.
- Unimpeachable ethics.