CFP BOARD

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

Position:	Manager, Corporate Relations	**Status:**	Non-Management
Department:	Corporate Relations	**FLSA Status:**	Exempt
Reports to:	Managing Director, Corporate Relations	**Last Updated:**	July 2020

General Function: Under general supervision, provides ongoing outreach to financial services firms to engage and promote CFP® certification.

Essential Functions:

- Supports Managing Director in Large firm relationships, meetings and special projects.
- Partners with Managing Director, Corporate Relations to support mid-sized Firms relationships, including tracking trends, primary firm contact for day-to-day firm requests and questions
- Gathers and applies intelligence on mid-sized firms and other targets to provide the organization with an understanding of the financial services landscape; identifies opportunities for outreach and cultivation
- Collaborates across the organization to identify and strategize on building new contacts and business relationships
- Identifies opportunities to create firm-related activities that grow the number of new CFP® certificants; provides feedback to key CFP Board staff from firm partners
- Identifies secondary research data and manages research programs, such as white papers, which advance the organizational mission
- Promotes CFP® certification at conferences to increase awareness of the profession
- Collaborates with the Corporate Relations team to implement an annual firm meeting by developing program content, agenda, and enlisting speakers/presenters
- Develops and presents content for the Financial Advice Working Group
- Works with Communications and other staff on messaging for pitches, RFP responses, presentations, media interviews, talking points, speeches, and background briefing materials
- Works with Marketing to produce materials to support cultivation and outreach such as collaterals, website content and one-off pieces to support business relationship efforts
- Develops and provides relevant content on blogs, webinars, and other communication initiatives such as presentations for Board meetings
- Collaborates with the Center for Financial Planning on funding prospects and cultivation
- Collaborates with IT department on developing custom firm reports, reporting issues and special projects.
- Performs other duties as assigned

Background/Skills/Abilities Preferred

- Bachelors' degree in marketing, business, or related field
- CFP® certification preferred
- Minimum 4 years' professional experience, preferably in the financial services industry
- knowledge and experience in using MS Office and Salesforce
- Exemplary verbal and written communication skills, including the ability to communicate with precision and effectiveness across all levels and functions, strong presentation skills
- Ability to represent the organization in a professional networking capacity
- Ability to take personal responsibility and ownership for delivering on organizational commitments
- Goal-oriented with the ability to work creatively and productively with colleagues
- Demonstrated ability to plan, create and grow initiatives based on strategic assessment
- Collaborative mindset and ability to structure mutually beneficial partnerships
- Ability to work in a team environment
- Significant travel required