

Marketing Specialist

The Certified Financial Planner Board of Standards (“CFP Board”) - headquartered in Washington, D.C.-is the certifying body for financial planning professionals. It is a non-profit organization that fosters professional standards in personal financial planning through its setting and enforcement of the education, examination, experience, ethics, and other requirements for the CFP certification.

CFP Board seeks a highly motivated team player to serve as Marketing Specialist. This position supports organizational “Access” initiatives and activities that engage with candidates for CFP® certification, ensuring they advance successfully through the certification process, as well as supports renewal and reinstatement marketing communications to current and former CFP® professionals.

The ideal candidate will embrace open collaboration, possess intellectual curiosity, and help the organization deliver results towards fulfilling our mission.

Essential Functions

- Works with Marketing team, marketing agency, and other internal departments to execute marketing programs
- Supports a broad range of marketing activities designed to support candidates through the CFP® certification process
- Uses data to monitor and report on program/campaign progress and effectiveness
- Supports marketing efforts that include email, direct mail, digital advertising, telemarketing, web, and other channels in support of organizational goals
- Coordinates production, print, and mailing of direct mail programs – including providing printer specs, receiving, and evaluating costs, managing postage requests, executing mailings, and receiving invoices
- Reviews and approves emails, collateral, and mailing proofs for accuracy
- Writes, edits, and proofreads copy for various marketing pieces including emails, collateral, web site content, reports.
- Oversees Renewal program marketing communications – including mail, email, digital ads, and telemarketing with an emphasis on editing and approving letters, overseeing vendor activity, providing lists for projects, and maintaining inventory
- Oversees Emeritus program for retired CFP® professionals that includes email communications, web site page maintenance as well as direct contact to assist potential Emeritus members
- Partners with the Center for Financial Planning, the marketing agency, and the Career Center platform vendor to execute Career Center marketing programs
- Maintains a schedule of data pulls and transfers for project execution with marketing agency
- Tracks program expenses as required
- Updates program dashboards and presents marketing results in written, PowerPoint, and oral formats
- Performs other duties as assigned

Background/Skills/Abilities Preferred

- Bachelor's degree in marketing or similar field, or an equivalent combination of education and experience
- Minimum three years related experience with marketing programs and/or promotions
- Working knowledge of direct response marketing (digital, email, mail, and telemarketing) highly desired
- Experience using data and metrics to measure impact and determine improvements
- Extremely detail oriented with strong organizational, interpersonal, oral, and written communication skills, experience in writing marketing copy
- Strong problem-solving skills
- Ability to multitask in a dynamic environment; comfort working in a time sensitive, deadline-oriented environment with frequently changing priorities
- High degree of self-responsibility and ownership of assignments
- Background in print production, direct mail execution, and email marketing execution
- Ability to work effectively and collaboratively with others
- Ability to manage outside vendors and address issues that arise
- Knowledge of AMS or CRM databases are a plus
- Must be proficient using MS Office suite

To apply, send your resume and one-page letter summarizing your interest, qualifications, and salary expectations. Please reference the Marketing Specialist position in your cover letter. Email your application to humanresources@cfpboard.org, Attention: Director, Human Resources, CFP Board, 1425 K Street NW, Suite 800, Washington, DC 20005.

CFP Board believes that diversity of experience and perspective are strengths and seeks to continue to grow a highly committed, skilled, and collaborative staff.