

Marketing and Client Service Associate

Chartwell Investment Partners

February 2021

Chartwell's Marketing team is looking for a creative, motivated self-starter who can work independently in a support capacity to make a significant contribution to the firm's overall marketing and client service efforts.

For this position, the candidate should be able to use their organizational skills to manage their time, as they demonstrate initiative to collaborate with colleagues in a fast-paced environment.

Responsibilities Include:

- Develop an understanding of Chartwell, its product offerings and respective target markets in order to be able to articulate each strategy's investment process, philosophy and other related concepts
- Develop and execute social media campaigns for LinkedIn and other social media platforms
- Accurately maintain/Update investment consultant databases (eVestment, MorningStar, PSN Informa) with most up to date data and written content
- Be responsible for running reports out of eVestment – peer analysis, performance reports and any other ad hoc analytics reporting
- Update, maintain and produce quarterly product fact sheets – Separate Account, Mutual Fund and CIT
- Generate data/statistics related reports from FactSet and Advent APX
- Run monthly and quarterly holdings for Equity and Fixed Income strategies
- Assist as needed with the completion of RFP's, DDQ's and RFI's with an emphasis on accuracy
- Provide backup support administering the firm's website
- Assist sales team with various ad hoc requests including preparing presentations, and any post meeting/call follow-up.
- Assist the marketing team with data checking all marketing collateral and help with various other projects as needed

Preferred Education and Experience:

- At least 1-3 years of working experience in a marketing/client service support role
- Bachelor's degree or equivalent experience in marketing, business, or finance
- Demonstrable ability to multi-task and adhere to deadlines
- Proficiency with Microsoft Office – Excel, Word, and PowerPoint
- Proficiency with Adobe Creative Suite – Illustrator, InDesign, and Photoshop
- Proficiency with LinkedIn, Twitter, Facebook and other social platforms preferred
- Detail oriented
- Excellent verbal and written communication skills
- Strong organizational and time-management skills

Please send your resume to Victoria Baker at baker@chartwellip.com.