



Short Company Profile:

Established in 2012, the Beaufort Group of Companies was created to address an increasing need for retail financial services advice and products. Our aim is to deliver sophisticated financial planning and investment management to individuals and companies in a transparent and value driven manner through partnerships with advisory firms.

Employment Specification

Job Title	Marketing and Events Manager	Date	January 2018
Department	Beaufort Financial / Reading	FCA Approved Role	No
Employment Status	Permanent, full-time	Location	Reading with some local travel
Reporting Line	Board	Salary	£30,000-£35,000 dependent on experience
% Travel Required	25% Travel Required		

Role Responsibilities, Principal Objectives & TCF

Working with the Board, you will be responsible for developing and implementing the Beaufort Financial / Reading marketing plan.

We are looking for a self-starter with marketing and business development experience, preferably from the professional services industries (legal, accounting, financial, management consulting).

We need someone who is keen to come in and hit the ground running in a busy team of financial planners, with a positive, can-do attitude and able to spin multiple plates.

Whilst reporting to the Board, this is a stand-alone role providing plenty of opportunities to use your initiative to get things done. Also, a willingness to learn and develop personally and professionally as the business and department expands.

You will be required to travel for events (typically within an hour of Reading) and to work outside of normal office hours (9am – 5.30pm) for attendance at events.

With the potential to progress rapidly, this would suit a Marketing or BD Executive who is looking to step up into a more senior role.

Key responsibilities

- Develop a marketing plan, schedule and budget for Beaufort Financial (Reading) and report on a monthly basis
- Run the Beaufort Financial (Reading) website
- Run social media channels - LinkedIn, Twitter, Facebook
- Production of marketing materials including the bi-annual client newsletter

- Run seminar programme (average one per month) - liaise with presenters, write, design & distribute invitation, identify delegates to invite, manage delegate bookings and communications, venue booking & catering, delegate materials & badges, social media promotion, on-the-day support, compile feedback, organise payments
- Run corporate hospitality events - identify delegates to invite, venue booking & catering, produce & issue invitations, manage delegate bookings and communications, organise payments
- Run breakfast club events (two to three per month)
- Professional connections support - pursuing relationships with local solicitors, accountants and other financial services providers
- Sourcing corporate gifts and materials (such as Christmas cards and gifts)
- CSR support – hosting Bar Quizzes (two per annum), plus other sponsorship opportunities eg sponsoring the Reading Legal Walk
- Relationship manager for corporate membership bodies eg TV Chamber of Commerce
- PR support – identifying opportunities for local press coverage

Competencies and Behaviours Required

Communication	A strong and proven communicator using a variety of medium – able to get your point across simply, clearly and imaginatively. Able to understand the audience and target market and find the right and best solution.
Team Work	Able to work across and within teams. Forming good professional relationships with a willingness to share and help others and the business succeed.
Problem Solving	Marketing is about understanding problems and providing clear and straightforward solutions. An ability to demonstrate this is essential.
Self Management	We are a busy team, self-management, a can-do attitude and self motivation are essential.
Planning and organising	There are multiple deadlines and the ability to work to tight timeframes with changing demands while still providing a good quality service is important.
Technology	Extensive use of Office packages and CRM databases, ideally experience of design packages
Learning	You will be expected to develop a firm understanding of the firm’s services and in-depth knowledge of who our key clients and professional connections are
Experience	Preferably 2-3 years’ experience in a BD and marketing role in professional services
Initiative and enterprise	Initiative, an open mind, a willingness to learn and design are key attributes.