



Marketing Specialist

Location: Corporate Officer | Neenah, WI

Why Join Legacy Private Trust Company?

At Legacy Private Trust Company, we are committed to excellence in wealth management and financial services, empowering individuals, families, and organizations to build meaningful and lasting legacies. As a trusted fiduciary, we hold ourselves to the highest standards of integrity, collaboration, and innovation. This commitment creates an environment where our team members and clients thrive together.

We view every role within our organization as integral to our collective success. With this in mind, we are highly selective in our hiring process, ensuring that each team member brings exceptional expertise and aligns with our core values. At Legacy, we prioritize cultural fit, as shared principles and purpose drive our ability to achieve outstanding results.

Joining Legacy means becoming part of a professional and supportive environment dedicated to growth, respect, and open communication. We foster a workplace where each individual's voice is valued, contributions are recognized, and continuous learning is encouraged. We believe that investing in our employees is essential to delivering the exceptional service our clients deserve.

At Legacy Private Trust Company, our people are our most valuable asset. If you aspire to be part of a forward-thinking team that values excellence, integrity, and collaboration, we invite you to explore a career with us. Together, we can shape a future that inspires and endures.

To Apply: Email Resume to Careers@LPTrust.com



LEGACY
PRIVATE TRUST COMPANY

Marketing Specialist

Our Company Job Description

LOCATION
Neenah, WI

DEPARTMENT
Marketing

REPORTS TO
Director of Marketing &
Communications

STATUS
Non-Exempt

Job Description

JOB SUMMARY

The **Marketing Specialist** plays a critical role in orchestrating and executing comprehensive marketing strategies for Legacy Private Trust Company. This position is essential for driving the promotional, research, development, advertising, and sales initiatives related to our investment and trust services. Through detailed planning and implementation of targeted marketing efforts, this role significantly enhances our market visibility and presence, ensuring our strategies are precisely aligned with corporate objectives and client needs.

DUTIES AND RESPONSIBILITIES

- **General Responsibilities:**
 - Maintain strict confidentiality in all aspects of client and staff information.
 - Adhere and uphold the conduct and performance standards of Legacy in all duties performed.
 - Performs all duties in accordance with the Conduct and Performance Standards of Legacy.
 - Maintains confidentiality of information, as well as controls and protects all bank sensitive information and materials, even if not related to assigned area.
 - Uphold the company's standards for confidentiality and professional conduct across all marketing and communication channels.
 - Maintains current knowledge of industry rules and regulations, ensuring that all marketing practices comply with legal standards and reduce risk. Proactively implement measures to uphold these standards within all marketing and promotional activities to maintain company integrity and trust.
- **Brand Management:**
 - Act as a Brand Ambassador, proactively enhancing the visibility and integrity of our brand across multiple platforms.
 - Oversee the creation, updating, and order management of marketing materials, including digital content and physical marketing assets like corporate images, business cards, letterheads, and name tags with our brand standards.

- Supports liaison activities with a select group of independent banks and investment Advisors with which Legacy has or desires a Trust Service Office Agreement.
- **Marketing:**
 - Coordinates all interactions with marketing, branding, and website consultants to ensure cohesive external communications.
 - Develop and implement marketing and advertising strategies that effectively promote our services to target audiences and enhance our client engagement.
 - Oversee the complete social media strategy, from platform selection and content development to graphic design, ensuring all aspects conform to Legacy's brand standards. Responsible for sourcing and developing engaging content, monitoring social media platforms for performance and feedback, and maintaining consistent, high-quality posting to effectively support our marketing goals.
 - Oversee the maintenance of the Marketing and Graphic Content Calendar to track and plan all social media and print ad content. This ensures timely and effective delivery, adherence to approval processes, and compliance with posting guidelines.
 - Coordinates all interactions with marketing, branding, and website consultants to ensure cohesive external communications.
 - Collaborate effectively with relationship team, investment team, enterprise risk management and other departments as needed to ensure a cohesive and unified approach to marketing strategies and broader company goals.
 - Conduct periodic regular reviews of the company website to ensure it remains engaging and aligns with marketing objectives; manage all updates and upgrades.
 - Utilize sophisticated analytics and reporting tools such as Google Analytics and Tableau to generate insights and compile comprehensive reports on marketing metrics and efforts, thereby enhancing decision-making processes and driving strategic adjustments as necessary.
 - Maintain and enhance our marketing database, ensuring all client information is up-to-date and utilized effectively to optimize marketing efforts.
 - Develops, maintains, and coordinates the preparation and distribution of Legacy's Economic & Financial Digest and similar publications and all other direct mail campaigns and programs and all e-marketing activities.
 - Oversee marketing projects from initiation through to final review, ensuring they align with strategic objectives and deliver on goals.
 - Develop presentation materials to support new business activities and assist in business development.
 - Engage with industry experts and centers of influence to maintain a strong professional network, supporting business development through strategic partnerships and referral opportunities.
 - Manages and implements the internal production of all direct mail, e-marketing, advertising, and program materials and coordinates the implementation and/or distribution with outside vendors, service bureau personnel, regulatory experts, and external auditors to determine the best available options and provide recommendations on those options.
 - Regularly evaluate our marketing tech stack, including CRM and design software, recommending upgrades to optimize marketing and sales performance.
 - Maintain cutting-edge knowledge of marketing trends, tools, and practices through ongoing professional development and training to drive innovation within the marketing department.
 - Assist in the research and formulation of the annual marketing budget, ensuring allocations align with strategic goals. Meet with potential vendors to evaluate products and services, recommending solutions

that integrate seamlessly into our marketing plans while optimizing cost-effectiveness and resource utilization.

- **Event Management:**

- Direct the planning and execution of all client and corporate events, ensuring high levels of engagement and satisfaction.
- Supports speakers at seminars and forums and participates/presents, as appropriate.
- Coordinates all client, prospect, COI, and/or employee gatherings, social excursions, trips, recognition/appreciation programs, gift-giving programs, and awards/incentive programs.
- Performs other related duties as assigned or requested.

Job descriptions may be subject to change as needed.



Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

MINIMUM EDUCATION

Bachelor's

PREFERRED EDUCATION

Bachelor's Degree in Marketing, Business Administration, or related field

MINIMUM EXPERIENCE

1 - 3 years relevant experience

PREFERRED EXPERIENCE

3-5 years in marketing within financial services

CERTIFICATIONS/LICENSES

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

While performing the duties of this job, the employee is regularly required to stand, walk, sit; use hands and arms, and talk or hear. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, the ability to adjust focus, and the ability to see color.

WORKING ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

The noise level in the work environment is usually moderate.

LANGUAGE ABILITY

Ability to read and interpret documents such as trusts, wills, deeds, and other legal documents, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence and proofread for accuracy. Ability to speak effectively before groups of customers or employees of an organization.

MATH ABILITY

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

REASONING ABILITY

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

COMPUTER SKILLS

To perform this job successfully, an individual should have proficiency in Microsoft Office, CRM software, and familiarity with digital marketing tools and platforms.

KNOWLEDGE, SKILLS AND OTHER ABILITIES

- Knowledge of principles and practices of organization, planning, records management, and general administration.
- General knowledge of various types of investment accounts (i.e., agency, trust, estate, retirement).
- General knowledge of trust industry terms (i.e., fiduciary, beneficiary, residual beneficiary).
- General knowledge of tax (i.e., gains, losses, income vs. principal).
- Ability and willingness to provide superior, personalized client service.
- Ability and willingness to project a professional image and tone in all interactions with external and internal clients.
- Ability and willingness to prioritize, multi-task, keep other team members on task and while meeting deadlines.
- Ability and willingness to follow oral and written instructions.
- Ability and willingness to maintain confidentiality.
- Ability and willingness to work well either alone or collaboratively in a team environment and under limited supervision.
- Ability and willingness to take initiative.
- Ability to develop strong working relationships internally and with 3rd parties.
- Strong understanding of marketing principles and customer engagement strategies.
- Excellent organizational and project management skills, able to manage multiple projects simultaneously while meeting deadlines.
- Strong interpersonal skills with a focus on relationship building and customer service.