



LEGACY

PRIVATE TRUST COMPANY

Director of Marketing

JOB SUMMARY

The Director of Marketing at Legacy Private Trust Company plays a pivotal role in developing and executing comprehensive marketing strategies that drive brand awareness, client engagement, and business growth. This role is critical in promoting our investment and trust services through targeted marketing, advertising, and sales initiatives. Leading the marketing team, the Director collaborates with other departments to create compelling content, manage digital campaigns, and analyze performance, ensuring alignment with corporate objectives and client needs. The ideal candidate is proactive, creative, detail-oriented, and passionate about marketing within the financial services sector, committed to innovation and compliance with industry regulations.

DUTIES AND RESPONSIBILITIES

- **General Responsibilities:**
 - Maintain strict confidentiality in all aspects of client, prospect, third party partners 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.
 - Maintain 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.
 - Performs other related duties as assigned or requested.
- **Brand Management:**
 - **Brand Ambassador:** Serve as a proactive Brand Ambassador, enhancing the visibility, integrity, and consistency of our brand across all platforms and touchpoints. Ensure the brand is accurately represented in all communications and marketing efforts.
 - **Marketing Materials Oversight:** Oversee the creation, updating, and management of marketing materials, including digital content and physical assets such as corporate images, business cards, letterheads, and name tags. Ensure all materials adhere to brand standards and are available to stakeholders in a timely manner.
 - **Brand Integrity and Consistency:** Monitor the use of brand elements across various channels to maintain consistency in visual and messaging standards. Provide guidance and support to internal teams and external partners to ensure compliance with brand guidelines.

- **Assess Brand Initiatives:** Monitor and assess brand initiatives using data to refine strategies and enhance brand integrity across all platforms.
- **Liaison with Partners:** Act as a liaison with a select group of independent banks and investment advisors with whom Legacy has or seeks to establish Trust Service Office Agreements. Facilitate brand alignment and collaborative efforts to promote a unified brand presence across these partnerships.
- **Marketing:**
 - **Marketing Strategy and Execution:** Assist in developing and executing marketing and advertising strategies and plans that effectively promote our services, enhance client engagement, and support business objectives. This includes a comprehensive annual content strategy and coordination with consultants to ensure cohesive external communications.
 - **Content Creation and Management:** Create, edit, and oversee content for various channels, including social media, websites, email campaigns, and marketing collateral. Manage the Marketing and Graphic Content Calendar to track and plan all digital and print content, ensuring timely and effective delivery.
 - **Social Media Management:** Oversee the complete social media strategy, from platform selection and content development to graphic design, ensuring adherence to brand standards. Responsible for sourcing and creating engaging content, monitoring platform performance, managing feedback, and maintaining consistent, high-quality postings.
 - **Digital Marketing Coordination:** Lead digital marketing efforts, including SEO, SEM, social media, and email marketing, optimizing campaigns to drive engagement and achieve strategic goals.
 - **Performance Analysis and Reporting:** Utilize analytics and reporting tools to monitor and analyze marketing metrics, such as website traffic, social media engagement, and email performance. Provide insights and recommendations for continuous improvement, driving strategic adjustments as necessary.
 - **Website and Database Management:** Conduct periodic reviews of the company website to ensure it remains engaging, aligned with marketing objectives, and optimized for search engines. Maintain and enhance the marketing database, ensuring all client information is up-to-date and effectively utilized.
 - **Project Management:** Oversee marketing projects from initiation through to final review, managing timelines, deliverables, and quality standards. Ensure all projects align with strategic objectives and deliver on goals.
 - **Design and Production Support:** Support the design and production of marketing materials using tools like Canva or Adobe Creative Suite. Manage the internal production of all direct mail, e-marketing, advertising, and program materials, coordinating with external vendors and service providers.
 - **Team Leadership and Collaboration:** Provide leadership within the marketing department under the direction of the VP Central Region Lead. This includes coordinating and running team meetings, setting agendas, ensuring follow-ups, and maintaining high standards of communication. Collaborate effectively with internal teams, including Relationship, Investment, and Enterprise Risk Management departments, to ensure consistent messaging and a unified approach to marketing strategies.
 - **Relationship and Vendor Management:** Build and maintain relationships with print and digital advertising sources throughout the state. Coordinate with outside vendors, service bureaus, regulatory experts, and external auditors to determine the best available options and make recommendations.
 - **Industry Engagement and Professional Development:** Engage with industry experts and centers of influence to maintain a strong professional network, supporting business development through strategic partnerships and referral opportunities. Stay updated on industry trends, tools, and best practices, particularly in financial services marketing, to drive innovation and maintain a competitive edge.

- **Budget and Resource Management:** Assist in the research and formulation of the annual marketing budget, ensuring allocations align with strategic goals. Evaluate potential vendors and products, recommending solutions that integrate seamlessly into marketing plans while optimizing cost-effectiveness and resource utilization.
- **Event Management:**
 - **Event Planning and Execution:** Direct the planning and execution of all client and corporate events, including seminars, forums, social excursions, and recognition programs. Ensure events are executed flawlessly, with a focus on maximizing engagement, satisfaction, and alignment with business objectives. Continuously refine future events based on detailed post-event analysis.
 - **Vendor and Budget Management:** Manage all aspects of event logistics, including vendor selection and coordination, budget management, venue selection, contract negotiation, and compliance with company standards. Ensure all events are delivered on time, within budget, and to the highest quality standards.
 - **Event Metrics and Continuous Improvement:** Track the success and outcomes of each event by collecting and analyzing data on vendor performance, guest engagement, budget adherence, and overall satisfaction. Utilize these insights to continuously refine and improve future events.
 - **Speaker and Presentation Support:** Provide comprehensive support to speakers at seminars and forums, including content preparation, technical setup, and on-site assistance. Participate in or present at events as appropriate, representing the company in a professional and engaging manner.
 - **Audience Engagement and Experience:** Develop and implement strategies to enhance the attendee experience at all events, ensuring that client, prospect, COI, and employee gatherings are impactful and memorable. Tailor events to the needs and preferences of different audiences to foster stronger connections and business development opportunities.
 - **Event Marketing and Communication:** Collaborate with the marketing team to develop promotional materials, invitations, and follow-up communications that drive attendance and engagement. Ensure all event communications are consistent with brand messaging and reach the intended audience effectively.
 - **Risk Management and Compliance:** Identify and mitigate risks associated with events, including safety, compliance, and reputational considerations. Ensure all events adhere to company policies, legal requirements, and best practices for ethical conduct.
 - **Stakeholder Collaboration:** Work closely with internal stakeholders, including Relationship Managers, Marketing, and Executive Teams, to align event objectives with broader company goals and ensure a cohesive approach to event management. Direct the planning and execution of all client and corporate events, ensuring high levels of engagement and satisfaction.

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.