



Title: Event Marketing Coordinator
Classification: Full-time non-exempt; Onsite
Department: Marketing

Objective: The Event Marketing Coordinator will be responsible for designing and executing strategic event experiences that reflect our firm's commitment to helping wealth advisory firms identify, build, and realize value. This role is instrumental in enhancing brand visibility, deepening client engagement and supporting business development through innovative, client-centric, and high-impact events.

Role Summary: We are seeking a detail-oriented and creative Event Marketing Coordinator to support the planning, execution, and optimization of in-person and virtual events that drive brand awareness, client engagement, and business growth. This role is responsible for coordinating internal and external events while ensuring alignment with organizational goals and brand standards. The ideal candidate will manage event logistics, vendor relationships, attendee engagement, and marketing assets, while tracking performance metrics to improve future event strategies. Success in this role requires strong project management skills, excellent communication abilities, and proficiency with marketing automation, CRM, and event management platforms such as HubSpot and Salesforce.

Essential Functions:

- Event Strategy & Execution
 - Plan and execute high-impact in-person and virtual events such as conferences and webinars.
 - Partner with internal stakeholders to align event strategy with business goals.
 - Manage event logistics including venue and vendor coordination, speaker submissions, registration, contracts, shipping, and on-site support.
 - Develop and publish event marketing assets such as landing pages, invitations, presentations, and collateral.
 - Oversee attendee engagement, registration, and lead capture.
 - Track and analyze event performance metrics during and after events to optimize future initiatives.
 - Maintain event calendars, budgets, and timelines with precision and accountability.
 - Ensure all events reflect our brand identity and uphold our commitment to excellence.
 - Assist in reporting on event and webinar performance to inform strategic decisions.

Preferred knowledge, skills, and abilities:

- Strong project management and organizational skills with the ability to manage multiple initiatives simultaneously.
- Excellent written and verbal communication abilities.



- Proficiency in marketing tools such as HubSpot, Salesforce, or similar platforms.
- Experience coordinating webinars and in-person events is a plus.
- Strong attention to detail and proactive problem-solving abilities.
- Ability to translate brand strategy into compelling event experiences.
- Experience managing event budgets and vendor negotiations.
- Basic graphic design skills and familiarity with brand guidelines.
- Experience managing event budgets and vendor relationships.
- Ability to thrive in a fast-paced, collaborative environment.

Education and Experience:

- 1-3 years of experience in marketing operations, event management, or a related field.
- BA in Marketing, Communications, Business, Event Management, or a related field preferred.
- Experience working in or with wealth management, financial services, or professional services firms is a plus.

Compensation and Benefits:

- \$24.00-\$28.85 per hour DOE.
- Medical, Dental, Vision, Life, Short & Long-term Disability, 401k with 25% employer match.
- Company lunches, snacks, and team building events.
- Company holidays (including employee's birthday) and accrued PTO.

Physical Factors & Working Conditions:

- Full-time non-exempt; professional office environment, hybrid remote possible with manager approval; minimal travel required.

