



Marketing Associate

The Company:

SKBA Capital Management is an independent San Francisco based boutique investment management firm. Since 1989, the firm has managed equity and fixed income portfolios for clients including institutions, pension plans, corporations, foundations, endowments and private clients. We bring unwavering dedication to a consistent investment process that has been developed and refined for over 30 years. Our value-oriented firm relies on team decision-making processes in all of our business activities, from portfolio management to client service, operations and compliance, and our boutique culture remains a hallmark of our firm. As a majority employee-owned firm our interests are aligned with those of our clients, and we strive to be defined by our time-tested investment approach, dedication to client service and high ethical standards.

Position Overview:

SKBA is seeking a self-directed and organized individual to be a part of the company's business development and marketing efforts. The person filling the role will contribute meaningfully to an established and respected firm and serve an important role on the firm's marketing team. This position requires a professional with capital markets experience and an interest in marketing who demonstrates sound business judgment, initiative and strong communication skills. SKBA seeks a person who is committed to maintaining a high-level of client satisfaction and who can thrive in a collaborative and team-based work environment.

Responsibilities Overview:

- Assist in identifying new business opportunities for business growth in separate accounts, mutual funds, and platforms
- Assist in contacting prospects and operate as the point person for coordinating business development calls and meetings
- Oversee the delivery of the firm's campaign messaging through our website, outgoing correspondence, pitchbooks, client materials, and press releases
- Oversee the timely completion of due diligence questionnaires RFPs/RFIs, and databases, ensuring that company messaging and product details is effectively presented and accurately communicated
- Operate as a first point of contact for new business inquiries and professionally represent the firm in email and phone communications
- Assist in organizing regular marketing meetings and complete role-specific next step and action items related to expanding marketing messaging, relationship development, and new business opportunities
- Participate in relevant industry conferences and engage participants for prospecting as needed
- Track sales and pipeline reports and manage the company's CRM database
- Point of contact for relevant technology and marketing vendors

- Maintain critical documents and support in various aspects of compliance documentation per industry policies and requirements
- Assume special project work and additional responsibilities as requested or assigned

Qualifications:

- 2 - 5 years of experience in the investment management or capital markets industry
- Bachelor's degree or equivalent work related experience
- Series 65 preferred or required within six months of employment
- Familiarity with the operation of multiple business channels: separate accounts, mutual funds, and SMA/UMA managed accounts
- Experience managing media content in materials such as pitchbooks, product brochures, fact sheets, and websites
- Working understanding of databases and management of data content
- Strong time management skills with the ability to prioritize tasks and see projects to completion within a set timeframe

Skills:

- Excellent organizational and project implementation skills with proven track record of meeting deadlines and goals
- Understanding of the investment industry and maintains current and relevant knowledge related to the company and its products
- Demonstrates sound business judgement and professionalism
- Excellent written and editing skills with an ability to proofread text and fact check data
- Effective and professional verbal communication skills with a high comfort level on phone calls with prospects
- Demonstrates great follow-through and is detail oriented
- Strong skills in Microsoft Office (PowerPoint, Outlook, Excel and Word) and experience with CRM systems
- Desire to work in a boutique firm with a collaborative work environment

Position Specifics:

- This is a San Francisco financial district based position that offers a hybrid work schedule
- There may be a component of travel to this role for direct engagement with prospects and participation in industry conferences