

About Shepherd Financial

Shepherd Financial is an independent wealth advisory firm specializing in objective consulting advice for corporate retirement plans, other institutions, and individual clients. Our passion is creating responsible, retirement-ready individuals. We accomplish this through informative, personalized communication and tools to transform financial behavior. Above all else, our team values one another, creating an exceptional client experience, and producing high-quality work.

Position Description

The Media Development Specialist (MDS) will be a creative, organized, and motivated individual with a passion for clear, purposeful communication. You will work closely with the Director of Creative and Strategic Operations (DCSO), providing support and ensuring the timely delivery of requested materials. You will strive to carefully hone the Shepherd Financial brand experience for both prospects and clients. The abilities to learn independently, create positive, authentic relationships, and act as a community leader are essential to your success in this role.

Core Responsibilities

Client and Prospect Media Experience

- Compile original and curated content for use in the following:
 - Client e-newsletters (plan sponsor, individual, and participant)
 - Blogs
 - Client and prospect deliverables
 - Financial wellness webinars
 - Education/engagement video scripts
- Assist DCSO and Retirement Solutions Consultant with video development and production
- Partner with DCSO and Director of Retirement Plans to further Shepherd Financial brand credibility with industry designations and awards
 - Develop a comprehensive designations and awards list
 - Gather necessary information from team members to complete relevant applications
 - Implement new designations and awards in current client and prospect materials

Social Media Management

- Coordinate with DCSO to attract and retain clients by increasing brand recognition via social media
 - Develop goals, create a regular publishing schedule, and produce timely marketing campaigns for social media platforms (LinkedIn, Facebook, Twitter, and YouTube)
 - Promote applicable content and upcoming events through social media platforms
 - Oversee design of new cover photos, profile pictures
 - Develop consistent engagement with followers, clients, and prospects on social media platforms through social listening, commenting and responding to comments, sharing posts, etc.
 - Proactively research best practices; this may include testing new products and utilizing social ads
- Maintain Shepherd Financial website
 - Upload monthly blog posts
 - Update team biographies, headshots, awards, and designations as needed
 - Track website SEO
- Analyze metrics to establish ROI for website and social media platforms
 - At regular intervals, produce comprehensive reports with suggested adjustments

Qualifications

The ideal candidate for this position will possess:

- A bachelor's degree and relevant industry experience
- Experience with both traditional marketing and social media marketing
- An ability to execute multiple complex projects concurrently, produce work quickly and efficiently, and maintain acute focus on detail and excellence
- A desire to continuously learn and creatively apply new information
- Fundamentally sound writing and editing skills
- The flexibility to act as both a communicative team player and dependable, autonomous worker
- The ability to regularly analyze and offer productive feedback on materials and processes
- A proficiency in Microsoft PowerPoint, Excel, and Word
- Experience with Adobe Creative Cloud preferred
- Experience with WordPress or similar hosting site
- A willingness to execute Shepherd Financial's Confidentiality and Non-Piracy Agreement, requiring post-employment obligations relating to non-solicitation, confidentiality, and non-disclosure