

Sales and Marketing Associate

Culture for Growth

Are you looking for a chance to prove yourself as you strive to reach your full career potential in financial services? The six-person Zeo team is seeking a hardworking, self-motivated and energetic professional who wants to take an active role in the firm's collective success.

Zeo Capital Advisors is a traditional financial firm with untraditional start-up momentum, ambition and culture. Zeo is a "low floor, high ceiling" workplace for someone who is resourceful, wants to contribute and is eager to learn. Zeo manages \$360 million in fixed income assets across a mutual fund and separately managed accounts, with innovative products and services on the horizon to accelerate the firm's growth.

Zeo is a culture of:

- Client-centricity;
- Intellectual curiosity;
- Collaboration;
- Humility;
- Resourcefulness;
- Integrity;
- Authenticity;
- Innovation;
- Wit; humor; and fun.

Opportunity for Impact

Zeo takes a consultative, service-oriented approach to asset growth and retention. We differentiate ourselves by working with advisors to understand their practice, discuss their asset allocation strategies and explore whether there is a potential mutual fit. As a Sales and Marketing professional, you will be based in San Francisco to assist across sales, client service and marketing. This is an opportunity to have an immediate impact on all aspects of investor relations and to be an instrumental part of a growing firm, working with the Director of Investor Relations to:

- Contribute directly to Zeo's growth through sales, branding and servicing efforts;
- Identify prospective advisors in key geographic areas and customize introductory messaging;
- Engage with clients, prospects and peers at sponsored conferences and industry-related events;
- Develop creative content for digital marketing campaigns through MailChimp; and
- Present pipeline reporting and internal success metrics to the team quarterly.

Qualifications for Success

- Bachelor's degree with 0-4 years of experience; Spring Internship option for May graduates
- Comfortable with CRM and database management
- Strong written and verbal skills
- Project management oriented
- Flexible, humble, with a willingness to learn and ability to switch gears quickly
- Series 65 will be required; CFP, CFA or CAIA a plus

Career for Ambition

- [Learn more about Zeo](#). Send resumes to careers@zeo.com with the subject line: "[Insert adjective] Sales & Marketing Applicant" (e.g. Amazing Sales & Marketing Applicant).