Investment Management Proposal Writer

Chandler Asset Management is an independent Registered Investment Adviser specializing in investment grade fixed income portfolios for institutional clients. We are dedicated to helping clients achieve their investment goals. With over $6 billion under management, Chandler strives to deliver outstanding investment performance and client service through a comprehensive array of investment grade bond portfolios. Since its founding in 1988, the firm has provided fixed income investment solutions that seek to preserve principal, reduce risk and enhance income in our clients' portfolios.

Job Description

The Marketing Writer will manage all aspects of formulating and delivering our marketing message across all channels including Request for Proposals, website, newsletter, and consultant due diligent questionnaires. Support the Chandler Asset Management marketing efforts by researching and analyzing marketing opportunities.

Job Responsibilities

Manage all aspects of the RFP (Request for Proposal) process from inception to delivery of final copy. Prepare timely, accurate and concise proposals in response to RFPs. This task requires that the applicant have a sufficient understanding of investment theory and practice to respond to questions using our response bank and craft new responses to previously unanswered questions. The successful applicant will be responsible for researching background information on prospects and interviewing our firm's knowledge experts in order to articulate our investment process in responses. He/she will manage the time-constrained RFP process to ensure that all RFPs are complete, thoroughly proofed, edited and all requirements are met by their specific deadlines. In addition, the Writer will review and maintain proposal responses and other information to ensure that the integrity of the firm's message is consistently reflected through all marketing channels and in all marketing materials.

- **Complete consultant due diligence questionnaires** using the proposal response bank and portfolio performance and characteristics compiled by our investment operations and compliance departments.
- **Ensure that the firm's message and distinctions** carry through all marketing channels and in all marketing materials accurately and consistently using the Response Bank as a primary source for data.
- **Support the marking effort** by researching opportunities for future growth, including geographic expansion, identification of new clients, and suggestions for new products.

Required Abilities and Experience

- Manage and adhere to internal and external deadlines
- Manage relationships across the organization
- Coordinate marketing meetings with other departments

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- Manage competing interests and multiple projects
- Supporting initiatives of the Sales and Marketing Team
- Problem solve content/process issues as needed
- Propose initiatives to improve proposal processes and content
- Write and edit responses to RFP questions
- Manage the RFP response bank
- Work with the investment team to ensure RFP responses are accurate and complete
- Work with regulatory compliance specialists to ensure materials conform with firm policies and industry regulations
- Work with sales, client service and administrative staffs to coordinate all aspects of the proposal to ensure quality of delivery of on-time proposals
- Review marketing materials to ensure the integrity of information we provide across all channels and in all materials

Applicant Credentials and Qualifications

- Bachelor's degree required at minimum; Journalism, English, Communications, Business Administration, Public Relations or Marketing preferred
- Minimum of 2 years of experience in proposal, technical or business writing
- Excellent writing, editing and interviewing skills
- Ability to work independently as well as in a team setting
- Strong client relations experience
- Strong research and analytical skills
- Able to work across the organization with all levels of management
- Able to manage deadlines effectively
- Excellent verbal and written communication skills
- Excellent problem solving skills
- Expert use of Microsoft Office suite (Word, Excel, PowerPoint)
- Experience with fixed income investment management preferred

Applicant Personal Profile

1. Strong organizational skills
2. Detail-oriented
3. Highly accurate
4. Good work ethic
5. Self-motivated, with the ability to work independently
6. Excellent communication skills
7. Team player with good interpersonal skills
8. Critical eye for editing and proof-reading
9. Time management skills

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