

GlobeFlex Capital, L.P.

RFP Specialist/Marketing Manager

This position can be carried out remotely and we are looking nationally for the right candidate. For someone located in the San Diego region there is the option for in-office or hybrid work.

GlobeFlex is a boutique equity investment management firm located in San Diego, with a satellite office in Boston. We serve institutional investors, and need an organized, energetic, and highly resourceful individual for this full-time position on the Marketing & Client Service team.

She/He/They will have an eye for design and positioning, a laser-like attention to detail and the ability to manage multiple projects with differing priorities to meet deadlines. Ours is a dynamic, collegial, team-oriented environment, where everyone wears multiple hats.

Responsibilities include:

- Prepare and deliver responses to RFPs and DDQs, collaborating across departments as needed to gather information and compile submittals
- Organize and maintain the language library
- Manage the monthly and quarterly database update process
- Curate suite of marketing materials and the company website
- Create new or customized materials and data files as requested
- Create content for the LinkedIn company page
- Monitor and share news on the institutional investor marketplace and search activity
- Work closely with the CCO to ensure consistency across materials and communications and compliance with the GIPS Standards and SEC Rules
- Coordinate with the investment team on marketing content and periodic white papers
- Provide ad hoc data/analytics, narratives and performance commentary

Desired Experience and Skills:

- 3-7 years of relevant work experience, preferably at a registered investment adviser or investment consultant
- Organized, detail-oriented with excellent writing and proof reading skills
- Ability to conceive and implement design concepts and graphics
- Experience with eVestment, various consultant databases, and Omni
- Solid foundation in equity investing concepts and ability to build knowledge of the investment, operations, finance, and compliance aspects of our business in order to effectively describe and articulate our capabilities
- Understanding of relevant data and analytics, including portfolio accounting, performance, attribution, risk metrics, portfolio characteristics, and quantitative factors
- Proficiency with Microsoft Office is essential, particularly PowerPoint and Excel
- Knowledge of FactSet, Portia, RFPio, and/or Satuit CRM is a plus
- Positive, productive, proactive, and great at juggling multiple responsibilities
- Able to work both independently and be a team player, while working closely with team members with differing styles, timelines, and priorities
- High ethical standards and accountability
- Effective communicator

Requirements:

- Undergraduate degree in a related field, though experience may offset this
- Excellent references

Compensation: Commensurate with experience and to be discussed when appropriate with qualified candidates. Our benefits package is comprehensive and generous!

Location: Remote from anywhere in the U.S.

If interested, please email your resume and references to [**jobs@globeflex.com**](mailto:jobs@globeflex.com).

GlobeFlex is an equal opportunity employer.