

**CETERA FINANCIAL GROUP
JOB PROFILE**

JOB TITLE:	Wealth Management Education Coordinator		
Job Family:		Job Code:	
Department:	Wealth Management	Reports To:	
FLSA Status:		Location:	El Segundo, CA
Market Point Range:		ICP Range:	
Date Completed:			

POSITION SUMMARY	Provide high level coordination and execution of Wealth Management Education online, and in person meetings and events. Candidate must be well organized; detail oriented, takes initiative, work well under pressure and is a team player
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PRINCIPLE RESPONSIBILITIES	<ol style="list-style-type: none"> 1. Coordinates Wealth Management University (WMU) Conferences. Including but not limited to: agenda preparation, registration administration, speaker coordination, material preparation, PowerPoint review, writing communications, maintaining inventory of WMU materials and supplies, continuing education credit, maintaining attendee progress statistics 2. Provides Marketing Communications department with required material to create training guides, manuals, frequently asked questions and other materials for new technology and project roll outs 3. Broker-dealer liaison for Wealth Management sessions at regional and national conferences. Duties include but not limited to: providing session topics, developing content, working with speakers and coordinating materials 4. Develops, schedules and coordinates Advisor online training sessions. Duties include but not limited to: building tracking system, working with technology vendors, speaker coordination, and posting content to websites 5. Ensures content on websites in current and correct 6. Other duties as assigned
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KNOWLEDGE, SKILLS AND ABILITIES	<ul style="list-style-type: none"> • Bachelor's Degree • 1-2 years relevant work experience • Advanced knowledge of Microsoft Office; including but not limited to Word, PowerPoint , Excel and Live Meeting • Ability to handle multiple priorities simultaneously • Excellent organizational and time management skills • Strong verbal and written communication skills including editing and proofreading • Excellent written and oral communication skills • Sound judgment and problem solving skills
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ADDITIONAL INFORMATION	<input type="checkbox"/> Does the incumbent in this position have direct accountability for staff supervision/management? No <input type="checkbox"/> Does the incumbent in this position have budget accountability? No <input type="checkbox"/> Is travel expected to perform this job? A minimum of 0%-10% domestic travel per calendar year.
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