

## Marketing Associate, Boston Office

*Trillium Asset Management, LLC is the oldest investment advisor exclusively focused on sustainable and responsible investing (SRI). We believe that environmental, social, and governance (ESG) factors play an integral role in the investment process, which can lower portfolio risk and help identify the best-managed companies.*

### Job Summary

The Marketing Associate will provide support to the Sales and Marketing team in the Boston office. This position requires someone who is very organized, has superior attention to detail and can handle multiple responsibilities, and can work both independently and as a team player.

### Duties and Responsibilities

- Manage the firm's client and business data. This includes new/closed accounts, firm and product AUM, client type, composite performance, HR stats etc. for submission to consultant databases and use in marketing materials.
- Manage and update all industry, partner databases and platform questionnaires (i.e., eVestment, Morningstar, etc.)
- Interact with the firm's business partners (i.e., consultants) and provide them with periodic performance updates
- Manage firm's master RFP and ensure it is accurate and compliance approved. Partner with internal department liaisons to collect standard RFP responses. This role includes drafting responses to RFP questions, as well as ensuring responses from other departments are complete and compliance approved
- Update and maintain the marketing presentations; ensure all materials are compliance approved

### Qualifications

- Strong technical skills and working knowledge of portfolio management system (Advent APX)
- Advanced knowledge of Microsoft Excel
- Strong interpersonal and communication skills. Candidates must be able to effectively communicate verbally and in writing with clients, members of the firm and outside contacts
- Must have excellent organizational skills and be able to perform multiple tasks concurrently with superior attention to detail
- Team player, able to work well with all levels of the firm, as well as with clients and outside vendors
- A willingness to work on projects outside of core responsibilities to help the firm achieve goals

### Compensation

Trillium Asset Management LLC provides a generous compensation package that includes 401(k), profit sharing plan, group life, long-term disability, health, dental, and vision insurance benefits, paid time off and performance-based bonus program.

**We will only consider applications with an attached professional resume and cover letter.**

Please email: [mmcdonough@trilliuminvest.com](mailto:mmcdonough@trilliuminvest.com)