

Join the Team

Help democratize wealth management!

Summary

We're bringing to market a next-generation investment vehicle: an automated, low-cost stock portfolio that uses tax optimization to outperform comparable ETFs and index funds after-tax. We want your help publicizing groundbreaking research, establishing thought leadership and getting the word out to financial advisors and investors.

Smartleaf Core Portfolios (SCPs) are algorithmically managed portfolios that track indexes (such as the S&P 500®) while providing tax management and customization. Compared to ETFs, SCPs provide better after-tax performance, the ability to incorporate existing stock accounts, and customizations such as socially responsible investing.

Smartleaf Asset Management (SAM) is a subsidiary of Smartleaf, Inc, the leading provider of automated portfolio rebalancing software in the wealth management industry. Over \$50B in assets are managed through our system encompassing everything from individual investment accounts to charitable endowments. SAM is using that software to solve a bigger problem: how to create the world's best investment product for tax sensitive accounts.

Responsibilities

SCPs are the most important project in the company and we need your help to bring it to market. As the first member of the marketing communications department, you will be collaborating closely with the principals and will have the opportunity to test out marketing strategies in real time, measure their impact, and iterate. You will do most of the writing, but you're not just a writer- you'll tune your ear to how customers talk about the product in order to figure out what benefits to highlight, what use cases to address, and what language to use. The opportunity to grow is limitless.

Within the first three months, expect to write a few press releases and marketing posts with assistance from the principals. By the end of the third month, you can expect to know enough about our product and the industry to be responsible for all SCP marketing content.

Responsibilities (cont'd)

You will also:

- Write and maintain the website
- Write the marketing copy for product collateral
- Collaborate with Financial Engineers on Technical Whitepapers
- Translate Technical Whitepapers into plain-English Marketing Whitepapers
- Author blog posts, if you think we need blog posts. Or any other sort of posts for that matter.
- Build relationships with press and manage our PR firm
- Attend trade conferences to meet clients and build relationships
- Hire your staff as we grow

Requirements:

- Successfully led the marketing effort for a product before
- Writing! You do it well!
- Background in financial services or in something quantitative like science/technology
- Deep desire to promote financial products that are actually good for the end-consumer

Benefits:

- Competitive salary
- Flexible schedule
- Ability to work in a 30-person company with proven technology that just might change how investments are managed in this country
- Beautiful sunlit office in Kendall Square
- All the delicious organic food you can eat
- An espresso machine (like it's 1999!)
- All the benefits you'd expect in a leading technology company
- A president that really values parallel structure in bullet points

Smartleaf is an equal opportunity employer.