

Job Description

GFP Community Manager (Sept 2021)

The **Global Financial Planning Institute** (gfp.institute): Providing education, community, tools/resources and research to financial advisors working with expats in the US and Americans abroad.

Position Summary

The Global Financial Planning Institute (GFP) is an organization dedicated to education, community, resources and ongoing research to support financial advisors who work whose financial lives cross borders.

We are a decentralized organization with staff in the USA, Mexico and Australia.

Organization Description

A couple distinctive attributes;

- US-registered but location independent
- Gen X/Y owned firm
- Cloud-based technology platform

Firm Values

The values we seek to apply to every interaction, every day include;

- **Honesty:** In actions, with myself and others at all times
- **Sustainability:** Thinking of future generations. Reducing impact on the planet.
- **Providence:** Having or showing foresight; providing carefully for the future, characterized by or proceeding from foresight, mindful in making provision
- **Holistic:** Overall wellbeing, not focusing on any specific element to the detriment of others
- **Proactive & Timely:** Having the resources/information/action ready and on hand when needed
- **Efficient:** Get more done with less
- **Informed:** Aware of the facts
- **Focused:** Dedicated to pursuing a course of action once settled upon

If you're looking for a 9 - 5 office job that keeps bank hours, save us both the effort and please do not apply. We have events in different time zones and frequently host early morning and/or evening events which means it is a necessity to weave life and work together as required. Getting the job done correctly and on time is what we're about.

We believe the only sustainable competitive advantage is continuous innovation and we encourage, support and will pay for on-going learning and development.

Firm Name: Global Financial Planning Institute	Computing Platform: Mac / iOS
Business Type: LLC, Minnesota Registered	Operating System(s): Mac OSX (successful applicant will be a competent Mac user)

Job Title: Director of Operations / Community Manager	Email: Gmail
Reports to: President of GFP Institute	Word Processing/Spreadsheet Software/CRM: <ul style="list-style-type: none"> Google Workspace (Gmail, Google Docs, Google Sheets, Drive etc)
Pay: \$27/hr for 32 hours per week (8 hrs per day)	
Apps: <ul style="list-style-type: none"> 1Password Mailshake Mighty Networks Stripe Notion Wrike TextExpander Active Campaign Hootsuite Wix 	Employment Type: W2 employee
Term: Temp to Hire	
Project Management: wrike.com for internal Company projects	

The successful applicant will be US-based, outgoing, process/checklist oriented, and an experienced traveller. Ideally, the candidate will also have experience in financial services and sales.

Essential Duties and Responsibilities (by Subject):

Eliza's Notes on the Nature of the Job and Tips for Success

- Must be detail oriented and very organized. Should be creative about how to build/guide the community!
- MUST have set hours that overlap as much as possible with Ashley (ie - he works afternoons for GFP and does his other job/work in the morning). Because of time zone differences, MUST be very responsive during work hours otherwise days can get lost on a project simply due to slow communication.
- Hopefully willing to at least respond to communications outside of work hours if it's a simple question or to let Ashley know when he'll get to something.
- Needs to understand that Ashley needs prompting to stay on top of things and get things done on time as he's exceedingly busy.
- When scheduling anything you must pay special attention to time-zones (dates, days of the week, and time). This is surprisingly confusing at first!
- With what Eliza has done to date, the community manager job thus far has been about 5% of what it should be. He can run with this and be part of making the GFP a much, much bigger success

- He should plan all webinars, and masterclass. Needs training to get branding right, add feedback surveys, etc, uploading the slides after a webinar, etc. Upload to MN, etc. This is also much more complicated than it seems like it should be so it will take a while to learn the details.
- He should be in charge of membership fees/collections/reimbursements/speaker fees
- He should be involved in the planning of the conference - the go to man on the ground
- Will need detailed orientation to Mighty Networks and be in charge of all groups
- Should do the Mighty Networks Community Building class
- He should be in charge of the Find an Advisor tool so he gets to know all the players and can really help connect the people in the network
- In charge of the social media marketing
- Needs to know how to use the various tools to contact everyone (Stripe, Active Campaign, etc).

Community

- Implement Open member welcome
- Lead conversations and reply to member questions on various GFP forums:
 - Invite member participation
 - Develop a weekly newsletter template to provide summary of interaction
- Address member's questions about GFP/Master-class
- Schedule speakers
 - For GFP Master class
 - For monthly CE
- Co-host webinars
- Tools: Mighty Networks, Google Docs, Google Slides, Wix blog

Corporate Development

- Research and add service providers
- Use TextExpander and create new snippets

GFP Content

- Copywriting for posts/events
 - Working with ghost-writers/Marketing Coordinator to have finished materials SEOd and published
 - Working to get podcasts published/promoted
 - Work with brand ambassador on promotional work
 - Maintain social media channels
- Tools: Wix, Mighty Networks, Hootsuite, Facebook, LinkedIn, Twitter,

Website

- GFP website uploads (uploading lessons, materials, presentations etc)
- Tools: Wix, Mighty Networks, Active Campaign

Logistics

- Business trip planning
- Conference organization
- Conference bookings (e.g. AICPA, STEP, FPA, NAPFA)

- Travel bookings
 - Ubers
 - Flights
 - Hotels
 - Restaurants
 - Activities
- Shipping of conference materials

Special Projects: Ability to solicit interest and gain commitment from disparate stakeholders - requires emailing and calling different Australian expat groups to organize events

Education and Experience

- Experience in using: Mac OSX, Google Workspace

Application Instructions

Only candidates who meet the above-stated qualifications will be considered. If you do not meet the aforementioned criteria, please save your time and don't apply.

Your resume MUST INCLUDE A COVER LETTER EXPRESSING YOUR INTEREST IN WORKING TO SUPPORT GFPI AND WHY YOU FEEL QUALIFIED FOR THIS JOB. Please email applications to ashley@arete-wa.com. No phone calls please!