

# Marketing & Growth Associate

## About Us

Sherman Wealth Management is a fast-growing, fee-only wealth management and financial planning RIA based in Gaithersburg, MD. We work with clients across the country, with a special focus on young professionals and families in the DMV area. Our mission is to help clients build confidence in their financial lives through personalized solutions.

We are a small, tight-knit team looking for a motivated individual who can wear multiple hats and grow with us. If you thrive in a fast-paced environment, excel at keeping things organized, and want to be part of a firm that values innovation, growth, and superior client experience, we'd love to hear from you.

## Role Overview

We are seeking a **Marketing & Growth Associate (Chief of Staff Track)** to help drive the firm's next phase of growth.

This is not a traditional admin role. This person will play a central role in shaping our marketing efforts, supporting business development initiatives, and improving the overall client experience—while also acting as a right hand to leadership.

You'll be involved in everything from content and campaigns to events, operations, and strategic projects. If you're someone who likes ownership, variety, and seeing the direct impact of your work, this role offers a unique opportunity to grow alongside the firm.

## Marketing & Brand Growth

- Support and execute marketing initiatives across channels (email, social, blog, events)
- Assist in content creation, editing, and quality control for all public-facing materials
- Help develop and maintain a consistent brand voice and client experience
- Coordinate campaigns, partnerships, and local outreach efforts
- Track and organize marketing efforts to improve consistency and effectiveness

## Business Development & Client Experience

- Support client meeting preparation and follow-up
- Help improve and streamline the client journey
- Assist with event planning and execution (client events, networking, community outreach)

## Chief of Staff Support

- Manage scheduling, calendars, and internal workflows
- Organize and maintain systems (Google Drive, CRM, internal processes)
- Assist with vendor coordination and general office management
- Support compliance-related tasks and stay current on industry requirements

## Qualifications

- Detail oriented with strong organizational and time management skills
- Excellent written and verbal communication skills.

- Eager to grow and contribute to marketing efforts of the business
- Tech-savvy — comfortable with digital work, learning new software quickly (experience with CRM systems, Google Workspace, or marketing platforms a plus).
- Ability to manage multiple tasks and meet deadlines in a fast-paced environment.
- Prior Marketing Experience

**Workplace Benefits:**

- Health Insurance Deductible Stipend
- 6% 401k Match After 90 days
- Hybrid Work Environment

**Salary**

- \$55,000-\$70,000 Annual Salary