



# Marketing/Well-Being Functional Description

## Team is accountable for:

- Graphic Design
- Video/animation planning/production
- Copywriting
- BD/CRM/Branch collateral
- Research, UX/UI
- Brand/Reputation Management
- Internal Communications
- Corporate Comm/PR
- Critical Comms
- Change Management

Graphic Design/UX

Multi-Media

Corporate Comms

Copywriting

Workflow Mgmnt

Creative Dev & Communications

Integrated Marketing

Marketing Well-being Wealth Advisory

Life. Money. You. LLC (CUSO)

BCU Wealth Advisors, LLC (CUSO)

Financial Coaching

Digital Delivery

Content/Planning

Wealth Advisors (RIA, Fiduciary)

Guided Digital Wealth

Financial Planning

Campaign Strategy

Web Experience/UX

Paid Media

SFMC Automation

Analytics

Social Media

Workflow Mgmnt

## Team is accountable for:

- Centralized, Omni-Channel Planning & Execution
- SF Mktg Cloud Journeys: EM/DM/Batch/Drip/Digital
- Product Strategic Partner
- New Member Engagement / Onboarding
- EMOB, HVS
- SF Lead Generation
- UX/UI, CMA Mktg Website
- Lumin ad content strategy & implementation
- Push Notifications/SMS
- Social content & strategy
- Paid Media - Search, OOH, social, affiliate, etc.
- Analysis: Targeting, Attribution/ ROI/Conversion