

## Position Description

**Title:** Marketing and Administrative Intern

**Reports to:** COO

**Salary Range:** \$18.00-\$20.00 per hour (depending on location)

**Location:** Remote

**Benefits:**

- Paid sick leave depending on location.
- Not eligible for employer-sponsored health benefits.

NWAM, LLC dba Northwest Asset Management is committed to fostering, cultivating, and preserving a culture of diversity and inclusion. Diverse and inclusive teams have a positive impact on the services we provide our clients and advisors. We embrace and encourage our employees' difference in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique. Military veterans and spouses are highly encouraged to apply. NWAM, LLC dba Northwest Asset Management is an SEC Registered Investment Adviser.

## Job Summary

The Marketing & Administrative Intern will support both the firm's marketing initiatives and core administrative operations. This role is ideal for a detail-oriented student interested in marketing analytics, business operations, and client service within a regulated financial services environment.

On the marketing side, the intern will review and screen inbound website inquiries generated through current campaigns, identify high-potential leads for internal follow-up, and analyze engagement trends to improve marketing effectiveness.

On the administrative side, the intern will assist with operational tasks that support client service, internal coordination, and day-to-day firm efficiency. This dual role provides hands-on exposure to both client acquisition strategy and the operational infrastructure of a growing investment advisory firm.

## Duties and Responsibilities

### Marketing Responsibilities

- Assist the Marketing team with day-to-day marketing tasks and initiatives.
- Review and screen inbound website form submissions to assess lead quality and intent.
- Escalate high-potential inquiries to appropriate internal team members in a timely manner.
- Analyze lower-intent or non-qualified submissions to determine what prompted users to click through and submit forms.
- Track patterns and trends related to traffic sources, messaging, and user behavior.
- Collaborate with the Marketing team to help refine and optimize current marketing campaigns based on findings.
- Develop a short project, report, or presentation summarizing observations, trends, and recommended campaign improvements.
- Participate in regular check-ins focused on learning objectives, feedback, and professional development.
- Perform other marketing-related responsibilities as assigned.

### Administrative and Operational Responsibilities

- Provide general administrative support to departments, advisors and team members.
- Assist with client onboarding and client services as needed.
- Maintain and organize electronic records in accordance with firm policies and compliance requirements.
- Assist with internal reporting, data entry, and documentation updates.
- Help track workflow processes and identify opportunities to improve operational efficiency.
- Support special projects across departments as assigned.

## Requirements and Qualifications

- Currently pursuing a degree in Marketing, Finance, Communications, Business, Analytics, or related field.
- Solid analytical and critical-thinking skills with attention to detail.
- Clear written and verbal communication skills.
- Strong organizational and project coordination skills with the ability and experience to handle and prioritize multiple assignments and conflicting deadlines, while providing a high level of client service.
- Ability to be responsible for confidential and time sensitive material.
- Proficiency with Microsoft Office products such as Word, Excel, and Outlook is required.
- Ability to work in a team-based environment, proactively covering and sharing task responsibilities with other team members.
- Be self-motivated, show initiative and creativity in all aspects of work (e.g. creating new methods to streamline tasks).
- Work independently with little supervision and knows when to ask for guidance, clarification, assistance.
- Possess a high level of professionalism, confidentiality, discretion, and judgment.
- Desire/ability to work successfully in a small company environment.

