

Summary

Marketing professional with extensive experience in the asset management industry and a proven track record in content strategy and development, social media, and digital marketing operations. A history of success leading global cross-functional teams, establishing new programs, and managing complex projects for integrated marketing campaigns. Passionate about using technology, media, and data to create compelling narratives that drive awareness and engagement. Coach and team player always ready to pitch in with solid writing, editing, web, social media, communications, and data analysis skills, an inclusive management style, and a background in financial journalism.

Experience**Omri Ben-Amos LLC, Principal**

2019 - Present

- Founded a consulting firm partnering with asset managers to optimize their marketing content strategy and production, digital marketing, and social media.
- Led the website redesign and developed a content strategy and social media program for a mid-sized minority-owned U.S. asset manager as part of a rebranding.
- Managed high-priority RFP, RFI, and DDQ projects for a top-25 ranked global asset manager, collaborating with sales, relationship managers and investment managers.

ClearBridge Investments, VP, Marketing

2001 – 2019 (Joined predecessor CAM in 2001, acquired by Franklin Templeton in 2019)

- Reported directly to the CMO and partnered with the C-suite, senior PMs, and sales teams to plan and execute retail and institutional marketing campaigns.
- Managed the strategic development and production of thought leadership, product, and brand content for institutional and retail audiences, including commentaries, pitchbooks, white papers, videos, blogs, podcasts, and webinars.
- Wrote 150+ commentaries annually for retail, institutional, and third-party use. Analyzed attribution data and worked directly with PMs to deliver accurate and compliance-approved content for Mutual Funds, SMAs, MDAs, ETFs, Closed-End Funds, UCITs, and offshore funds. Coordinated compliance and PM approvals.
- Applied AI to accelerate delivery of product commentaries by 5-10+ BDs, using storytelling software (Narrative Science's Quill, now Salesforce's Tableau) to automate draft performance attribution text.
- Created the ClearBridge podcast and grew its audience to 30K+ listens. Managed its monthly planning, production, and distribution.
- Produced 50+ evergreen, quarterly and ad-hoc videos that earned 55K+ views.
- Automated fact card updates for 30+ institutional strategies representing over \$100B in AUM using Adobe Experience Manager, saving 7+ BDs from the quarterly production process.
- Led the digital transformation of the institutional marketing program, centered on the comprehensive redevelopment of clearbridge.com. Working with internal stakeholders and external vendors, I coordinated a global cross-functional team that transformed a static web 1.0 site into a dynamic and responsive digital marketing hub. I partnered with sales to define distinct client personas and UX journeys for the institutional, advisor, and retail audiences. I introduced automated lead scoring to

funnel marketing-qualified leads into our CRM. Owned site content, UAT, analytics, and daily operations. Managed \$2M+ project budget and vendor relationships.

- Established and led the firm's social media program and implemented Hootsuite to manage content, compliance, social listening, and analytics. Built and administered all platform pages and led training for approved social media users. Collaborated with graphic design team to develop and optimize content templates. Co-developed the firm's social media policy with CCO and documented all SOPs.
- Used Adobe Analytics and Google Analytics to guide content strategy, optimize website and social KPIs, and improve SEO performance.
- Coordinated the firm's outbound email marketing program and Salesforce subscriber lists, maintaining average open rates above 20%.
- Experience with a range of asset classes including equities, fixed income, and alternatives. Well versed in ESG investment and DE&I topics.

Legg Mason, AVP, Investment Specialist

2005 – 2006 (Joined new LM affiliate ClearBridge Advisors at launch in 2006)

- Worked directly with the CEO, CIO, and CMO to create marketing collateral and brand communications for the launch of the new LM affiliate ClearBridge Advisors.
- Wrote both product and firm-level responses for RFPs, RFIs, and DDQs.
- Created and led a new program to deliver same-day trade rationales to SMA clients.

Citigroup Asset Management, AVP, Investment Specialist

2003 – 2005 (CAM acquired by Legg Mason in 2005)

- Subject matter expert on Smith Barney and Salomon Brothers mutual funds.
- Produced product and market commentary for multiple PM teams and the CIO.

Senior Financial Writer

2001 – 2003

- Wrote and edited mutual fund marketing and shareholder communications.
- Led process improvements to ensure Sarbanes-Oxley Act compliance.

Forbes Magazine, Associate Editor

2000 – 2001

- Managed a team of reporters, researchers, and copy editors on special editorial projects for Forbes Magazine and Forbes.com.
- Wrote articles on investment themes and strategies for retail investors.

Education

New York University – B.A. Political Science & Journalism

Technology

Experience with Adobe Analytics, Adobe Experience Manager, Adobe Marketing Cloud, Adobe Marketo, Bloomberg, Diligence Vault, Diligend, FactSet, Google Analytics, Hootsuite, JIRA, Loopio, MorningstarDirect, MS Excel, MS PowerPoint, MS Word, Pardot, Qvidian, Salesforce, Seismic, SharePoint, Smartsheet, and WordPress. Familiar with agile web development methods, UX, and responsive web design.

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