Request for Proposal

Fractional Chief Marketing Officer

About Zenith Wealth Partners

Zenith Wealth Partners is a fee-only, independent, fiduciary wealth management firm. We do not take commissions, we are not tied to a proprietary product shelf, and we choose our partners based on what serves our clients. Our purpose is unlocking financial freedom for all, and our niche is intentional financial advice: guidance that treats every client's situation as specific to them, never templated.

We serve two distinct client communities. Both are underserved audiences where we can drive real value, and we serve each on its own terms:

- Individuals & Families: first-generation wealth builders, largely age 40–55, including many women-led households, nationally based, racially diverse.
- Endowments & Foundations: 501(c)(3) organizations with endowments averaging between $2 and $20 million, many led by people of color.

What ties both communities together is a shared belief: democratizing access to investment options, making complex financial topics genuinely simple, and building real relatability with communities the wealth management industry has historically overlooked.

We operate on EOS (the Entrepreneurial Operating System), which means clear seats, clear accountability, and a leadership team that treats structured discipline as a feature, not a constraint. We are growing, and we are building the team and systems to sustain that growth for years to come.

> *We have a clearly differentiated brand and client base that does not fit the traditional wealth management mold. We are looking for someone who starts by listening and builds from what they learn, not from a playbook they have used elsewhere.*

Current State of Marketing Operations

Marketing at Zenith today is run by one full-time Marketing Associate, who is responsible for day-to-day execution across the firm's channels. Although there is currently no dedicated senior marketing leader, leadership and team members are actively involved in contributing to both strategy and content creation.

New business generation differs meaningfully by practice. In Individuals & Families, referrals currently drive approximately 50% of client acquisition, while website/search engine and other marketing channels play a real and growing role. In Endowments & Foundations, referrals drive more than 90% of new prospects, concentrated in personal and professional relationships within the regional philanthropic community; events and digital channels currently serve more of a credibility-reinforcement role post-referral than a lead-generation one. Diversifying the lead generation for this audience is a near-term opportunity.

The team has already laid useful groundwork, including detailed client personas for both practices, giving this role a running start on positioning and messaging rather than a blank page. There is also a clear, high-leverage opportunity to bring more rigor to how Zenith tracks and measures marketing's impact by building out attribution and lead-source visibility, with full leadership support to do it right.

Updates to our brand and messaging, including a website update, have been underway in 2026, informed by a recent audit that gives this role a concrete, ready-made roadmap of where to focus first. This is a rare chance to step into a firm with strong bones, real leadership buy-in, and a clear mandate to shape marketing strategy from a position of momentum rather than repair.

The Scope

Zenith is hiring a fractional marketing leader to own the Marketing & Sales seat. This is not designed to be a project engagement or a task list of deliverables. We are seeking someone looking to fill a leadership role with real accountability for strategy, team development, and growth outcomes.

Engagement Structure

Engagement Type	Fractional / part-time retainer
Typical Commitment	Approximately 30–40 hours/month; exact scope to be proposed by the candidate
Reports To	Integrator / COO
Direct Reports	The firm's full-time Marketing Associate
EOS Seat	Marketing/Sales Seat Owner, Level 10 participant, Scorecard owner
Start Target	Early-to-mid October 2026

Responsibilities

Brand & Messaging

- Own and evolve brand positioning, voice, and messaging across both client communities without collapsing what makes each one distinct.
- Ensure consistency across every external touchpoint: website, social, referral materials, events.
- Build on our internal brand work to date and maintain a living brand playbook as we grow.

Growth Marketing

- Build and manage a quarterly marketing plan tied to firm growth and referral goals.
- Design and lead a systematic referral program, not relationship-dependent.
- Develop and prioritize complementary channels to generate a meaningful share of leads alongside referrals.
- Define, track, and own the Marketing Scorecard.

Marketing Associate Development

- Provide structured direction and mentorship, building strategic and managerial thinking, not just assigning tasks.
- Own the quality and cadence of outbound marketing communications.

- Build capability in the Associate over time, so the function can continue to scale

EOS Integration

- Attend Level 10 Meetings and Quarterly sessions as the Marketing/Sales Seat Owner.
- Own weekly and quarterly Scorecard measurables.
- Identify and resolve marketing-function issues using the EOS framework.

What We're Looking For

- 10+ years of marketing experience, including at least 3 years in a CMO, VP, or Senior marketing role
- A track record of building brand strategy from the ground up in a services business.
- Proven growth marketing results such as referral programs, pipeline building, and channel outcomes
- Experience directly developing junior marketing talent.
- Comfort operating effectively in a part-time, fractional leadership context.
- Genuine curiosity about our clients and business. Financial services experience is a plus, not a requirement. We've found practitioners with strong fundamentals and real curiosity outperform those who arrive with industry familiarity and apply it without adapting.
- Openness to participating in a structured operating framework (direct EOS experience is a bonus).

Just as important as the resume: We are adding a real member of our team, not hiring a vendor. We are looking for someone who collaborates rather than dictates, who is genuinely energized by making room for people and perspectives our industry has historically underserved, and who sees this business with its two distinct communities and its refusal to look like a typical wealth management firm as a chance to do the work differently rather than a chance to apply what has always worked elsewhere.

Proposal Requirements

Please organize your response into the sections below. Two to three thoughtful, specific answers per section — we're looking for depth, not a checklist.

Name, Background, and Firm Profile

- Your name (and firm name, if applicable) — are you responding as an individual practitioner or through a firm or collective? If a firm, who specifically would be assigned to our account?
- How many active client engagements do you currently carry, and how do you protect each one from bandwidth competition?
- Do you currently work with, or have you previously worked with, other wealth management or financial advisory firms? If so, would that create any conflict serving both of our client segments, and are you open to a period of exclusivity within our category?
- Are you available to join us in person periodically, roughly one to two times per quarter for leadership offsites or other commitments? Do you have any travel constraints we should be aware of?

Approach and Philosophy

- Walk us through how you approach learning a new business before making recommendations. What do you need to understand first?

- What do you think most wealth management or financial services firms get wrong about marketing, and how would your approach with us be different?
- What do you think about referral-driven growth relative to other channels, and where does each fit in a business like ours?
- How do you prefer to communicate day-to-day? Asynchronous, scheduled check-ins, a mix? What's your typical response time?
- What's your approach to managing team members who report to you but are not your direct hires? How do you build trust and accountability in that structure?

Representative Experience

- 2–3 examples of comparable work in services businesses, with measurable outcomes where possible.
- Describe a brand or messaging framework you built from scratch. What worked, and what would you do differently today?
- Tell us about a time you developed a junior team member's strategic or managerial thinking

Proposed Onboarding Plan

- What would your first 30, 60, and 90 days with us look like?
- What would you need from our team to be effective quickly?
- What marketing metrics would you propose we track together, and how would you report on them?
- Describe a marketing result you're proud of that didn't show up as revenue right away. How did you know it was working?

Fees

- Your proposed monthly retainer, and what it includes.
- Your hourly rate for any scope beyond the retainer.
- Any additional costs we should anticipate (freelancers, tools, media spend, etc.).

References

- Contact information for at least two prior fractional or consulting engagements.
- Your relationship to each reference (client, manager, partner) and the nature of the engagement.

Please include a brief bio or CV for the fractional CMO who would be assigned to this engagement as an appendix to your response.

Timeline & Next Steps

Step	Stage	Timing
1	RFP responses due	By September 15, 2026
2	Shortlist selected (finalists)	September 21, 2026
3	Finalist conversations	Week of September 28, 2026
4	Reference checks	Week of October 5, 2026
5	Engagement begins	Early-to-mid October 2026

Please submit proposals to Partheev at partheev@networthzenith.com. Questions before you submit are welcome and can be directed to the same address.