

Conquest Planning is a leading financial planning software company on a mission to deliver personalized financial advice to more people. Founded in 2018 by a team with over 30 years of experience building market-defining planning technology, Conquest is once again transforming the industry — this time with a modern, AI-native platform that helps advisors deliver advice with clarity, confidence, and scale across the entire wealth spectrum.

As our first dedicated Product Marketing hire, you'll partner closely with the CMO and Product leadership to build our market narrative, create the messaging that defines Conquest as we drive global growth, and build the frameworks and systems that become the foundation for product marketing at Conquest. The **Product Marketing Lead** is a high-visibility role for a strategic doer who loves switching between big-picture thinking and hands-on execution. The **Product Marketing Lead** will be Sr. Manager or Director level depending on experience.

This is a remote / work from home opportunity. Open to candidates in U.S. and Canada.

Duties of the role include:

You will lead and execute the full spectrum of product marketing activities, including:

- Build the product marketing discipline from scratch: processes, standards, frameworks, and repeatable systems for GTM and storytelling
- Develop clear, differentiated positioning and messaging that simplify complex concepts and differentiate Conquest across segments and personas
- Lead end-to-end GTM strategy for new products, features, and major releases from planning through launch to performance analysis
- Build and optimize internal communication rhythms, enablement programs, and cross-functional alignment practices
- Produce high-quality content including pitch decks, value frameworks, solution briefs, demo scripts, competitor insights, objection-handling guidance, and website copy
- Inspire consistent product storytelling across the customer lifecycle, ensuring alignment from awareness through expansion
- Conduct ongoing customer research to understand pain points, buying triggers, language, value perception, and adoption patterns
- Own competitive intelligence, including tracking competitors, shaping our differentiation strategy, and enabling the field with timely insights
- Collaborate closely with Product on roadmap prioritization, customer feedback, and market opportunities
- Influence pricing, packaging, and market segmentation strategy with data-driven recommendations
- Use AI tools to accelerate research, narrative testing, content development, and competitive monitoring
- Establish consistent measurement for launches, messaging performance, and sales enablement impact
- Serve as the internal voice of the market, driving clarity, alignment, and actionable insights across teams
- Partner directly with the CMO on category storytelling, market positioning, and strategic priorities

Qualifications required:

- Strategic product marketer with 5+ years of experience in fintech, wealth tech, or complex technical products or regulated industries
- Proven builder who has created messaging systems from scratch, product launch playbooks, GTM processes, or product marketing foundations
- Strong storyteller who can translate market insights and customer needs into memorable narratives and engaging content
- A hands-on leader who is as comfortable crafting a narrative or building a deck as you are shaping strategy and advising executives
- A curious, analytical thinker who naturally explores products hands-on and loves digging into customer behavior and competitors
- Strong collaborator and communicator who has been celebrated as a true partner across Product, Sales, Marketing, and Account Management
- Uses research, customer data, and AI-assisted tools to accelerate insight generation and content development, and values evidence over opinion to regularly test ideas in market
- Proactive, organized, and energized by an environment with big ambitions and evolving processes as we grow across the US, UK, and maintain our market leadership in Canada

What to expect:

- An inclusive culture comprised of extremely talented individuals.
- A leadership team with a proven track record of success.
- The opportunity to join a company as it expands across the globe.
- Competitive compensation and generous benefits.

How to Apply:

We're excited to learn about you and want to give you the opportunity to set yourself apart from everyone else. Along with your Resume, send us a personalized Cover Letter, Email or Video telling us why you are interested in this job, the fintech industry, and the reason you would like to work with us.

Next steps:

If this exciting opportunity is of interest to you, please forward your application as described above with **Product Marketing Lead** in the subject line to Human Resources at human.resources@conquestplanning.com by **February 23, 2026**.

We thank all applicants for their interest. Only those invited for an interview will be contacted.

Conquest Planning Inc. is an equal opportunity employer. Our inclusive work environment welcomes diversity and supports accessibility. If you require accommodation at any time during the recruitment process, please contact human.resources@conquestplanning.com.