



Title: **Associate Financial Planner**

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

Creative Planning is a top tier wealth management firm that provides investment management services and full comprehensive financial planning in-house.

The **Associate Financial Planner** works with financial planners and wealth managers to develop financial planning recommendations, complete important analysis work, and ensure that clients are receiving the best advice by giving additional support to planners and wealth managers across the firm.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

Associate Financial Planner has the following characteristics (or some combination)

- No CFP or Series license, but strong interest and plans to earn
- Has few years of professional planning experience
- Strong organizational and time management skills
- Demonstrates competent analytical skills
- Demonstrates understanding of basic financial planning topics
- Frequently seeks assistance from other planners for planning or process-related items (growth opportunity)
- Proactively pursues opportunities to observe and learn from more experienced financial planners and wealth managers

EXPERIENCE / QUALIFICATIONS

- Bachelor's degree in Financial Planning, Finance, Accounting, Business, Mathematics, Economics
- Proficient in Microsoft applications
- Effective communication skills
- Meticulous attention to detail and accuracy

PREFERRED EXPERIENCE / QUALIFICATIONS

- 2+ years of professional financial planning experience or industry experience equivalent
- CFP
- Series 65 license

