CREATIVE PLANNING

Title: Senior Consultant

Location: Various

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. Creative Planning is a leading retirement plan advisor to employers and employees nationwide providing fiduciary consulting, investment advice, compliance support, and employee financial education.

The **Senior Consultant** delivers high quality and efficient service to both internal and external clients through Strategic and & day-to-day management of an assigned group of accounts. This role will require maintaining a book of business and partner with Team Leaders.

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

JOB DUTIES

- Maintain Salesforce records on assigned accounts
- Request and review meeting materials for accuracy
- Manage client relationships
- Attend client and prospect meetings
- Manage any follow-ups (e.g., meeting minutes, fund changes, match calculations) with internal partners such as investment analysts, account specialists, etc.
- Manage client projects (e.g., RFPs, M&A, plan consolidation) with internal partners
- Manage various projects simultaneously
- Must be able to interact and communicate at ease with all levels within the organization via phone, email, and/or in-person
- Other duties may be assigned.

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- 10+ years' experience in professional services, preferably in investment services
- Series 65 license or ability to obtain within 90 days
- Exceptional verbal, written and interpersonal skills required
- Strong presentation skills
- Extremely detail-oriented
- Strong communication and collaboration skills
- Customer service skills
- Ability to comprehend, analyze and interpret documents