

Title: Operations Manager

Location: Leawood, KS

Job Description: **JOB SUMMARY**

The **Operations Manager** partners with Wealth Managers and Financial Planners in preparing and processing paperwork to open and maintain client accounts. High performers handle high volume, complex work with a low error rate and embody the Creative culture.

#### **JOB DUTIES**

- Accurately prepares, processes and tracks paperwork for new and existing clients
- Correctly process distributions to clients
- Successfully prioritizes and juggles multiple tasks with competing priorities
- Delivers quality customer service
- Consistently display strong communication skills, both written and oral
- Must remain calm under pressure, be a good listener and be able to make good business decisions considering impact to client and firm
- Prepares, sends and manages online access information for clients
- Researches and resolves account related issues in a timely manner
- Acts as the liaison between Creative Planning and all custodians that we work with
- Ensure compliance with all regulatory guidelines
- Consistently meets or exceeds deadlines
- Works well independently and within a team environment with minimal supervision
- Exemplifies Creative Planning's culture and values
- All other duties as assigned

#### **REQUIRED EXPERIENCE / QUALIFICATIONS**

- Bachelor's degree
- Prior experience in financial services field

#### **TECHNICAL SKILLS**

- MS Office, Outlook, Adobe and Windows experience