CREATIVE PLANNING

Title: Emerging Wealth – Wealth Manager

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

Creative Planning is a top tier wealth management firm that in conjunction with investment management services also provides full comprehensive financial planning in-house. Creative Planning is one of the few firms that can provide investment, financial, tax and legal advice under one roof. Creative addresses all aspects of financial planning from estate planning, tax strategy and risk management to retirement, education and charitable planning – using all in-house specialists.

The Emerging Wealth – Wealth Manager's primary responsibility is to manage accounts under $400,000 that do not need a comprehensive independent financial plan by reviewing each for tax harvesting, opportunistic rebalancing and cash investment needs. The Manager is responsible for all trades, distribution requests and management of the strategies they recommend. A successful Emerging Wealth – Wealth Manager manages their own list of prospective clients as well as coordinates start meetings and updates for current clients. They must also maintain the client recommendation dashboards for each household. Success in this role will be measured by a variety of factors, including assets under management, asset inflow/outflow, retention rate, referrals, average billing rate & other billing concessions and percentage of clients using other Creative company services.

JOB DUTIES

- Same day response to clients
- Pitches and closes the prospective client (individual clients only)
- Conducts CPPWM start meetings, recommendations meetings and annual reviews (individual clients)
- Submits estate planning diagram requests (individual clients)
- Prepares the Dashboard & Investment Allocation recommendations (all)
- Researches and answers questions for other Wealth Managers
- Manages accuracy of the Client Relationship Management (CRM) system and S Drive
- Implements the Dashboard for individual clients – owning the client
- Answers and communicates investments with client (individual clients)
- Completes Dashboard updates for other Wealth Managers upon request
- Completes Dashboard updates for individual clients – following the 1/60 rule (e.g., for 900 clients, follow-up with 15 per day, 3 follow-ups per year and 1 annual review)
- Grey/overlapping tasks between department areas
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Must work out of the Kansas City Office
- Bachelor's degree
- Series 65 (or equivalent substitute) attained within 120 days
- 5 years relevant work experience
- Pass internal exams – Profiles/Dashboards

TECHNICAL SKILLS

- MS Office/Windows experience preferred
- iRebal experience preferred
- Orion experience preferred
- Dashboard experience preferred