



## 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 provides investment management services and full comprehensive financial planning in-house. 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 Manager's primary responsibility is to attract, retain and serve clients. The Wealth Manager is responsible for all trades, distribution requests and management of the strategies they recommend.

### **JOB DUTIES**

- Same day response to clients
- Pitches and closes prospective client introductions
- Conducts CPPWM start meetings, recommendations meetings and annual reviews
- Communicates investments with client and answers questions
- Prepares the Dashboard & Investment Allocation recommendations
- Submits estate planning diagram requests
- Implements the Dashboard for individual clients
- Manages the Client Relationship Management (CRM) system
- All other duties as assigned

### **REQUIRED EXPERIENCE / QUALIFICATIONS**

- Bachelor's degree
- Series 65 or 66 attained within 120 days
- 5 years relevant work experience within financial services
- Pass internal exams
- Position is located at the home office and will work remotely with clients outside of the greater Kansas City area

**PREFERRED EXPERIENCE / QUALIFICATIONS**

- Mutual fund, equity or bond trading experience
- CFP
- Direct communication with clients
- Financial Planning
- Retirement Planning

**TECHNICAL SKILLS**

- MS Office /Windows experience
- Ability to communicate effectively with clients via email and phone
- iRebal and Orion experience preferred