

Title: Investment Manager

Location: Leawood, KS

Job Description: **JOB SUMMARY**

Creative Planning's **Investment Manager** works under the Director of Trading & Investments. The Manager's primary responsibility is to manage the accounts for their wealth management team by reviewing each weekly for tax harvesting, opportunistic rebalancing and cash investment needs. They are responsible for all trades, distribution requests and management of the strategy intended. A successful Investment Manager will trade each client account once per quarter and meet all weekly screening and monthly screening goals.

JOB DUTIES

- Setups new client accounts in portfolio management software
- Reviews iRebal for missing models monthly
- Processes distribution requests
- Updates and manages Cash Need Removal spreadsheet
- Performs manual reviews for trading opportunities for each client at least once per quarter
- Performs weekly tax harvesting and rebalancing reviews in client accounts
- Performs daily reviews for available cash to invest or to be generated
- Performs monthly custodian to iRebal manual cash reviews
- Performs monthly iRebal cash needs monthly and confirms accuracy
- Reviews iRebal positions marked DO NOT SELL monthly and confirms accuracy
- Sends wealth managers list of all fee schedules and inception dates by account and reviews with client prior to quarter-end
- Reviews quarterly for small accounts that can be closed or consolidated
- Places at least one trade per client per quarter

- Communicates with both clients and wealth managers to explain trades and answer questions regarding investment philosophy and its implementation
- Prepares and sends one-time reports requested by clients and advisors
- Develops recommendations for outside accounts
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's degree
- Series 65 (or equivalent substitute) attained within 120 days of hire

PREFERRED EXPERIENCE / QUALIFICATIONS

- Mutual fund, equity or bond trading experience
- Financial services experience

TECHNICAL SKILLS

- MS Office 2013/Windows 8 experience preferred
- iRebal experience preferred
- Orion experience preferred