



CREATIVE PLANNING

Title: Operations 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 Operations Manager's primary responsibility is to own the process of quickly and accurately preparing all documents required to open and maintain client accounts, with as little imposition on the client and advisor as possible (for example, never asking for information we already have). Any issues that occur along the way should be owned and handled by the OM and the client and advisor should be informed along the way.

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.

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

JOB DUTIES

All duties must be performed from the Overland Park office.

- 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 Windows experience