



Title: Client Service Coordinator

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 **Client Service Coordinator's** primary responsibility is to assist the Wealth Managers with client service-related tasks. The position requires communicating with clients and Wealth Managers to provide ongoing support with various tasks of client onboarding and day-to day maintenance.

**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 at the Overland Park office.

- Collaborate with internal teams to ensure smooth account openings, transfers, and asset allocations for clients.
- Manage and maintain client records, ensuring accuracy and completeness of data in the CRM system and other internal platforms.
- Execute account maintenance tasks, such as processing withdrawals, contributions, and account updates.
- Participate in team meetings and contribute insights to improve client service processes and procedures.
- Maintain a strong understanding of industry regulations and compliance standards to ensure all client interactions adhere to guidelines.

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

- Bachelor's degree
- Prior experience in financial services field
- Knowledge of financial planning concepts, investment products, and market trends.
- Excellent interpersonal and communication skills

- Strong organizational skills with an eye for detail to manage and maintain accurate client records.

#### **TECHNICAL SKILLS**

- MS Office/Windows