CREATIVE PLANNING

Title: Alternative Investment Operations Specialist

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The **Alternative Investment Operations Specialist** works with internal staff and external alternative investment service teams to manage all Alternative Investment subscriptions, capital calls and other related tasks.

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

JOB DUTIES

- Assist in preparing, tracking and managing all subscription documents and relevant paperwork for the firm's alternative investments
- Work with external alternative investment service teams and Creative Planning's internal AI team to process capital calls accurately and in a timely manner
- Communicatee with internal staff and clients to gather relevant information

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's degree with GPA of 3.5 or higher
- Highly detail-oriented

PREFERRED EXPERIENCE / QUALIFICATIONS

- Prior experience related to alternative investments
- Prior experience in a client service function

TECHNICAL SKILLS

- MS Office, Outlook, Adobe and Windows experience