CREATIVE PLANNING
RETIREMENT SERVICES

Title: Consultant 2

Location: Northeast

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 Planning is a leading retirement plan advisor to employers and employees nationwide providing fiduciary consulting, investment advice, compliance support, and employee financial education.

The **Consultant 2** delivers high quality and efficient service to both internal and external clients through Strategic and & day-to-day management of an assigned group of accounts. This role will require maintaining a book of business on core accounts, and occasionally partnering with Senior Consultants and Team Leaders.

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

JOB DUTIES

- Maintain Salesforce records on assigned accounts
- Request and prepare client materials
- Review meeting materials for accuracy
- Manage client relationships
- Attend client meetings
- Manage any follow-ups (e.g., meeting minutes, fund changes, match calculations)
- Manage client projects (e.g., RFPs, M&A activity, plan consolidation)
- Assist with due diligence projects and strategy
- Manage various projects simultaneously
- Must be able to interact and communicate at ease with all levels within the organization via phone, email, and/or in-person
- Other duties may be assigned

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- 4-9 years' experience in professional services, preferably in investment services
- Exceptional verbal, written and interpersonal skills required
- Strong presentation skills
- Extremely detail-oriented
- Strong communication and collaboration skills
- Customer service skills
- Ability to comprehend, analyze and interpret documents
- Series 65/66 license or ability to obtain within 90 days