

Title: Operations Analyst

Location: Overland Park, Kansas

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 Retirement Services, an offering of 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 **Operations Analyst's** primary responsibilities include building tools that automate & maximize the efficiency of our teams while working alongside other specialists in supporting the functions of the centralized services operations department. Those areas include but may not be limited to RFIs, Salesforce case management, database administration, & investment analysis.

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

#### **JOB DUTIES**

- Work directly with the Retirement Services division of Creative Planning
- Review and request Salesforce data set-up and maintenance with internal business associates to ensure data tables are complete & clean
- Build & manipulate excel charts and tables
- Create processes and procedures to ensure quality control and integrity of all data
- Work with other business areas to identify and target processes for automation
- Create connectivity from several different information systems to create connectivity and improve insights from the firm's data
- Provide best in class customer service to internal and external business partners and clients
- Meets or exceeds the Service Level Expectations (SLEs) set by the investment operations leader
- Keeps an open line of communication with all stakeholders including sales, consulting, operations, and finance leadership
- Evaluates feedback from stakeholders and assists in development of plan for areas of improvement and optimization
- Must be able to interact and communicate at ease with all levels within the organization via phone, email, and/or in-person
- Takes detail-oriented approach to projects and tasks
- Ability to comprehend, analyze, and interpret legal and supporting documents as well as investment performance data.
- Effective problem solving with minimal oversight
- Other duties may be assigned.

## EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university preferably in mathematics, statistics, finance, computer science, or business analytics
- 2+ years' experience in professional services, preferably in business analytics
- Intermediate to Advanced MS Office user, proficiency in MS Excel required
- Experience in automating tasks and procedures is a plus
- Willing to build expertise in areas with little to no knowledge required
- Strong organizational and time management skills to prioritize heavy individual workload to meet time sensitive deadlines.
- Ability to compile, analyze and interpret financial information and data to facilitate decision making.
- Demonstrated ability to work independently, as well as part of a team with minimal supervision.
- Database administration experience preferred
- SQL knowledge preferred
- Python knowledge preferred
- M/Power Query or PowerBI knowledge preferred
- Experience in automating tasks and procedures preferred
- Experience with investments or in the retirement industry preferred