



## CREATIVE PLANNING

Title: Trust Investments Officer

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 **Trust Investments Officer** manages a group of Specialty and Hard-to-Value assets within their area(s) of expertise to ensure they are managed as outlined by the policies and procedures of Creative Planning Trust Company.

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

### **JOB DUTIES**

- Must have the requisite knowledge in how to review and handle a variety of Specialty Assets for risk, suitability, and performance in trust accounts. Portfolios of Specialty Asset classes could include Real Estate, Closely Held Businesses, Mineral/Oil/Gas Interests, Insurance Policies, and/or Promissory Notes.
- Ensure Specialty Assets are managed within the framework of the OCC Handbook relating to Unique and Hard-to-Value assets.
- Review key documents pertaining Specialty Assets ensuring all key details are identified and disseminated to the appropriate trust area including Trust New Business, Trust Administration, Trust Operations, and Trust Investments.
- Contribute to and cultivate the knowledge of the investments staff within each specific Specialty Asset class area.
- Work with the Trust Investments Manager to develop efficiencies in the management of the Specialty Assets.
- Partner with the Trust Investments Manager on key initiatives of the team.

## **EXPERIENCE / QUALIFICATIONS**

- Bachelor's Degree preferred and at least 5 years Specialty Asset management experience within a trust company environment.
- Ability to foster positive client relationships.
- Ability to represent the organization and the trust team in a professional and positive manner.
- Passion for growing and developing team-members.
- Exceptional organizational and time management skills.
- Ability to work in a team environment and independently.

## **TECHNICAL SKILLS**

- Microsoft Office proficiency
- Keen attention to detail