



Title: Financial Wellness Representative

Location: Chicago or Kansas City

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

The **Financial Wellness Representative** will primarily assist retirement plan participants understanding their options upon separating employment. The role will consist of taking inbound calls and conducting outbound communications to participants that may need our assistance. Additionally, the **Financial Wellness Representative** may be asked to conduct active employee education from time to time, both onsite and virtually for clients. This may include working with the plan sponsor and internal contacts to coordinate the details of the education.

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

JOB DUTIES

- Embrace our vision of "No Participant Left Behind," ensuring support for every participant in the Plan, regardless of their financial stage.
- Handle inbound and outbound calls and emails to educate plan participants about their options post-separation from their employer.
- Guide participants in making well-informed decisions regarding their retirement savings and overall financial objectives.
- Conduct both in-person and remote group meetings, as well as one-on-one sessions with participants.
- Work a minimum of 3 days per week in a Creative Planning office.
- Aim to localize meetings geographically, with occasional travel as required.

EXPERIENCE / QUALIFICATIONS

- Series 65 or 66
- B.A. or B.S. from an accredited university preferred
- Ability to work successfully with all levels within an organization ranging from key decision makers to day-day-to-day administrative staff.