



CREATIVE PLANNING

Title: Investment Manager Associate

Location: Overland Park, KS

Job

Description:

JOB SUMMARY

Creative Planning's **Investment Manager Associate** works under the Director of Trading & Investments and assigned Senior Investment Manager. The Investment Manager Associate is primarily responsible for maintaining the firm's ByAllAccounts portfolio management software. This includes linking new accounts, reconnecting stale accounts, and working with trading and operations teams to ensure accurate data is fed into the firm's recordkeeping system.

JOB DUTIES

- Set up new client accounts in portfolio management software and help implement strategy
- Perform maintenance on existing accounts that need to be re-linked to portfolio management software
- Create portfolio information packets for Investment Managers as requested
- Communicate with both Investment Managers and Advisors regarding trades and account link status
- Prepare and send one-time Orion reports requested by clients, Investment Managers, Advisors and Financial Planners
- Assists Investment Managers with basic trading functions
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Have or pursuing a bachelor's degree in business, finance, or related
- Must be within 1 semester of graduation

PREFERRED EXPERIENCE / QUALIFICATIONS

- GPA above 3.5 (must provide)
- Experience with mutual fund or equity trading
- Financial services experience

TECHNICAL SKILLS

- MS Office /Windows experience preferred
- Ability to communicate effectively with clients via email and phone

CREATIVE PLANNING DEPARTMENT QUALIFICATIONS

- Must be successful in role for a minimum of 6 months to be considered for the full-time position(s) of:
 - Investment Manager