CREATIVE PLANNING

Title: National Wealth Manager

Location: Various States

Job Description: **JOB SUMMARY**

Creative Planning is a Nationally recognized wealth management firm that in conjunction with investment management services also provides full comprehensive financial planning in house.

The **Wealth Manager** works directly with clients to develop and implement strategies to address their financial, investment, insurance, tax and estate planning needs. They are responsible for business development and client retention. The Wealth Manager is the point person for all client relationships and must have the ability to present the services offered by Creative Planning in a clear and concise manner.

JOB DUTIES

- Serves as the primary point of contact for wealth management clients
- Assist in the creation, delivery, execution and management of complex financial plans
- Increases market share in their local market
- Maintains a positive attitude and willingness to adapt in a rapidly changing environment
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- CFP® Certificant
- Series 65 (or equivalent)
- 7 years financial services experience including direct sales with investment clients
- Solid knowledge and ability to present complex financial topics to clients
- Ability to handle highly detailed work with a great degree of accuracy
- Bachelor's degree, preferably in a related field such as finance, business or marketing

PREFERRED EXPERIENCE / QUALIFICATIONS

- 10 or more years financial services experience to including direct sales with investment clients
- Graduate degree consisting of JD, MBA or CPA

TECHNICAL SKILLS

- Understanding and previous use of Windows 7 or 8
- Proficiency in MS Word, Excel and PowerPoint
- Understanding of mobile operating systems such as Android or IOS
- Ability to adapt and integrate new technology quickly