



Title: Financial Planner

Location: Various

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.

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

The **Financial Planner** is responsible for the last five of six steps in the CFP Board's Financial Planning Process. This individual interacts with clients daily to gather information, analyze information, develop recommendations, implement recommendations and monitor the financial plans of their clients. The Planner collaborates with one or more Wealth Managers in the firm to deliver expert, comprehensive financial advice to their clients.

JOB DUTIES

- Participates and conducts client meetings
- Prepares the Financial Planning recommendations
- Collaborates with members from each business line to best serve the client
- Manages accuracy of internal Client Relationship Management (CRM) software
- Implements Financial Planning recommendations
- Monitors the Financial Plan and communicates with clients
- Updates Financial Planning recommendations
- Grey/overlapping tasks between department areas
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- CFP® Certificant
- Relevant Educational Background (Finance, Accounting or Business Administration)
- 3 years financial services industry experience
- Pass internal proficiency exams
- Series 65 (or equivalent) attained within 120 days

PREFERRED EXPERIENCE / QUALIFICATIONS

- Previous financial planning experience

TECHNICAL SKILLS

- Microsoft Office proficiency
- Keen attention to detail