CREATIVE PLANNING
RETIREMENT SERVICES

Title: Consultant

Location: Houston or Dallas, Texas
*Houston preferred

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

The **Consultant** delivers high-quality, efficient service to external clients through the strategic and day-to-day management of an assigned portfolio, including Core and Core Plus Accounts. For larger accounts, the Consultant is supported by an Account Specialist as assigned by the Team Lead.

With advanced retirement and investment knowledge, a deep understanding of the client lifecycle, and awareness of external markets, the **Consultant** confidently leads client relationships. This role involves developing tailored solutions, demonstrating strong judgment, and networking with senior internal and external teams to enhance service delivery.

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

**JOB DUTIES**

- Manage clients and projects with minimal oversight, identifying and securing necessary resources
- Lead client work and take ownership of deliverables
- Maintain Salesforce records for assigned accounts
- Integrate client priorities into recommendations and understand the impact of recommendations on client decision-making
- Request client materials from Centralized Services according to established protocols
- Review meeting materials from Centralized Services for accuracy and delegate effectively to account specialists when applicable
- Handle follow-ups, including meeting minutes, fund changes, and match calculations
- Oversee client projects such as RFPs, M&A activity, plan consolidations, due diligence projects, and strategic initiatives
- Develop the ability to conduct ongoing fee discussions with clients, including recordkeeping and advisory fees, and involve Managing Directors or Team Leads as appropriate

**EXPERIENCE / QUALIFICATIONS**

- B.A. or B.S. from an accredited university

- Series 65/66 license or ability to obtain within 90 days
- 10-15 years' experience in professional services, preferably in investment services
- Exceptional verbal, written, and interpersonal communication skills for effective internal and external engagement
- Strong organizational abilities with high attention to detail
- Proven ability to handle competing tasks and manage time efficiently and effectively
- Collaborative team player with the ability to work well with internal teams
- Receptive to constructive feedback with a commitment to continuous improvement
- Experience managing overall client relationships
- Growing knowledge of investments, including general market trends, understanding of investment scorecard metrics, and the ability to address investment-specific questions from committee members
- Developing a deep understanding of the recordkeeper market and its capabilities
- Progressing technical consulting skills in areas such as M&A, plan design, and correctional procedures