



## CREATIVE PLANNING

Title: Trust Investments Associate  
Location: Overland Park, KS or Remote

### 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 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.

The **Investments Associate** provides administrative and operational support to the Investments Officer.

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

### **JOB DUTIES**

- Assists Investments Officer in maintaining records for marketable securities and specialty assets
- Coordinates set up and funding of special assets with the Investments Officer
- Obtains updated valuations and tax costs for special assets and ensures the trust accounting system is updated in a timely manner
- Monitors communications from the Alternative Investments team and notifies appropriate individuals when necessary
- Obtains and posts initial tax cost(s) to Trust Accounting System
- Ensures all required documents are obtained and scanned into the Trust Account's Special Asset File
- Establishes ticklers for important dates and items
- Files all items in appropriate files as they relate to special assets
- Demonstrates the ability to clearly and completely convey processes to update and/or develop new procedures when necessary

### **REQUIRED EXPERIENCE/QUALIFICATIONS:**

- Bachelor's Degree preferred and at least 2 years investment experience – preferably within a trust environment
- Ability to foster positive client relationships
- Ability to represent the organization and the trust team in a professional and positive manner
- Exceptional organizational and time management skills
- Ability to work in a team environment and independently

### **TECHNICAL SKILLS:**

- Microsoft Office proficiency
- Keen attention to detail