Title: Virtual Chief Information Officer

Location: Midwest

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. In addition, Creative Planning offers Managed IT solutions to the suite of services offered to clients.

The Virtual Chief Information Office provides technology guidance for our managed services clients and works to identify business risk and set goals to improve the ROI for their technology investments. The goal is to become a strategic partner to the client and align their technology needs to their business success. This position focuses on representing the client just as you would if you are on their staff.

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

Job Duties:

- Leads clients in the strategic planning of technology solutions in relation to business goals, challenges, risks, margins and market positions.
- Involvement in any staff meetings that would be key to successful partnership.
- Quarterly Business Reviews with key members of client's staff are scheduled, completed, and documented.
- Minimum 1 visit/phone call/email (if appropriate) weekly with main site contact; in some cases, twice weekly if appropriate.
- Reviewing and Reporting on IT Department performance when applicable.
- Annual (multi-year preferred) Budget established and updated quarterly; this will lead to NRR in the form of projects and upgrades.
- Regular Technology Alignment review and updates to client.
- Monthly onsite visit between QBR meeting months scheduled in advance. Need determined by weekly touches.
- Weekly 5-15 minute huddles with client team via Teams app.
- Knowledge of technology trends likely to impact the customer.
- Policy and Process Steering and development.
- May be involved in pre-sales process to assist in project scoping.

- Complete tickets in ticketing system to track time working on client issues and non-client issues.

Required Experience/Qualifications:

- 6+ years of technical support and project deployment experience.
- A degree or diploma in Computer Science, Management Information Systems or a related field is a plus.
- Industry certifications such as Network+, A+, Microsoft Certifications, VMWare certifications is a plus.
- Project Management Experience.
- Must be able to sit and stand, with occasional lifting up to 50lbs.
- Travel to client sites is a requirement of this role.