CREATIVE PLANNING®
RETIREMENT SERVICES

Title:	Account Executive, Financial Planning
Location:	Overland Park, KS Chicago, IL
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 **Account Executive** is responsible for driving client acquisition by delivering exceptional financial advice and personalized solutions to newly enrolled and exiting plan participants, demonstrating the value of our products and services. Through proactive outreach, the Advisor will focus on delivering high-value services that prioritize client goals and contribute to asset growth and retention. The **Account Executive's** primary objective is to positively impact clients' lives by educating, advising, and fostering lasting relationships.

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

JOB DUTIES

- Develops and implements marketing campaigns and outreach initiatives to engage plan participants, boost client retention, and attract new assets.
- Manage a high volume of outbound calls to qualify leads and set appointments with plan participants.
- Conducts meaningful conversations with clients to explore their financial goals, identify needs, and recommend tailored financial solutions to meet client objectives.
- Strengthens client relationships by providing expert guidance and advice, handling inquiries with precision and efficiency.
- Educates clients on various financial strategies, including investment, debt management, and retirement planning.
- Accurately record all prospect interactions in our CRM system.
- Works with high emotional intelligence to create an environment of client trust.
- Thrives in a structured, goal-oriented work environment.
- Manages time and prospecting efforts effectively to increase client engagement and contact rates.
- Achieve and exceed monthly targets for leads qualified, meetings set, and meetings held.
- Collaborate with the sales team to refine and improve lead qualification processes.
- Participate in ongoing training to enhance product knowledge and sales skills.

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- Series 65/66 license
- 2+ years' experience in financial services

- Previous experience working in a consultative sales role
- Outstanding customer service experience
- Results oriented, with a passion for talking to clients over the phone to uncover their financial needs and advise on client’s financial goals
- Self-motivated with a drive to meet and exceed performance targets
- Exceptional verbal, written, and interpersonal communication skills.
- Resilient and persistent attitude, comfortable with handling objections