CREATIVE PLANNING

Title: Account Executive

Location: Overland Park, KS

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.

The primary responsibility of the **Account Executive** is to drive client acquisition by qualifying leads and setting appointments for Wealth Managers. Ideal candidates possess strong sales acumen, excellent communication skills, and a passion for finance. This position offers substantial growth potential for recent graduates, career changers, or experienced sales professionals looking to make an impact in the financial services industry.

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

JOB DUTIES:

- Manage a high volume of outbound calls to qualify leads and set appointments with potential clients
- Conduct initial screening of prospects to determine their suitability for Creative Planning's services
- Schedule meetings between qualified prospects and Wealth Managers
- Maintain a persistent and professional follow-up process until a definitive outcome is reached
- Accurately record all prospect interactions in our customer relationship management (CRM) system
- 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

REQUIRED EXPERIENCE/QUALIFICATIONS:

- Bachelor's degree (recent graduates preferred)
- Strong interest in finance, sales, or the wealth management industry
- Excellent verbal communication skills with a confident phone presence
- Resilient and persistent attitude, comfortable with handling objections
- Self-motivated with a drive to meet and exceed performance targets

PREFERRED EXPERIENCE/QUALIFICATIONS:

- Basic understanding of financial concepts
- Knowledge of financial markets and investment products
- Previous internship or part-time experience in a sales-related role
- Experience with customer relationship management (CRM) software

TECHNICAL SKILLS:

- Proficiency in Microsoft Office suite, particularly Excel
- Ability to learn and adapt to new software systems quickly