



Title: Cashiering Associate

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

Creative Planning is a Nationally recognized wealth management firm that in conjunction with investment management services also provides full comprehensive financial planning in house.

The **Cashiering Associate** works under the Cashiering Manager and the Director of Operations. The cashiering associate's primary responsibility is to process cash requests upon the direction of the Wealth Manager or Financial Planner.

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

#### **Job Duties**

All duties must be performed from the Overland Park office.

- Schedule incoming or outgoing ACH transactions, wire transaction and checks via the custodian site
- Work with custodian service teams to schedule complex ACH, check and wire transactions
- Assist in resolving ACH, check and wire transaction questions
- Deposit and log client checks that the firm receives

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

- Bachelor's degree
- No experience necessary

#### **Preferred Experience/Qualifications**

- Prior experience in financial services field

#### **TECHNICAL SKILLS**

- MS Office
- Windows

## **CRITERIA FOR SUCCESS**

To be successful, one will be able to:

- Navigate custodian websites and internal programs such as CRM and Orion
- Have a limited number of errors when scheduling transactions
- Schedule ACH requests in a timely manner without letting speed affect accuracy
- Work well with others and have a positive work attitude
- Be coachable