



Title: Director, Client Engagement

Location: Various Locations

Job Description: **JOB SUMMARY**

If you enjoy the sales and onboarding process without cold calling, we have the role for you! Searching for highly motivated sales-driven financial advisors to take on the role of **Director, Client Engagement** with Creative Planning. In this pivotal role, your sole focus is client acquisition. You will meet with qualified prospects delivered through our marketing lead channels to learn more about the prospective client's needs and share with them our breadth of services.

At Creative Planning, we are proud to be a top- ranked independent wealth advisory firm, but prouder of the work culture we have developed.

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

JOB DUTIES

- Meet with incoming prospects who reached out to Creative Planning
- Collaborate with internal Brand Ambassador team who sets the initial client meeting for you
- Hold a meaningful introductory meeting with client leads to explore if Creative Planning is a good fit for their needs
- Communicate the depth of services Creative Planning offers
- Help facilitate client onboarding

REQUIRED EXPERIENCE / QUALIFICATIONS

- CFP® certified
- Series 65 (or equivalent)
- 5 years financial services experience including direct sales with investment clients
- Solid knowledge and ability to present complex financial topics to clients
- Ability to handle highly detailed work with a great degree of accuracy
- Bachelor's degree, preferably in a related field such as finance, business, or marketing

PREFERRED EXPERIENCE / QUALIFICATIONS

- 10 or more years financial services experience to including direct sales with investment clients
- Graduate degree consisting of JD, MBA or CPA

TECHNICAL SKILLS

- Understanding and previous use of Windows
- Proficiency in MS Word, Excel and PowerPoint
- Understanding of mobile operating systems such as Android or IOS
- Ability to adapt and integrate new technology quickly