

Title: Financial Wellness Consultant

Location: 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 Retirement Services is a leading retirement plan advisor to employers and employees nationwide providing fiduciary consulting, investment advice, compliance support, and employee financial education.

The **Financial Wellness Consultant** will deliver financial education services to the employees of Creative Planning Retirement Clients. He or she will be responsible for working alongside client service team members to develop and deliver education plans and in-person meetings to our clients. This includes creating annual education plans, conducting employee meetings, and participating in sales meetings to represent the education team.

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

**JOB DUTIES**

- Embrace our vision of “No Participant Left Behind”. We endeavor to help every participant in the Plan, regardless of where they are on their financial journey
- Work with Plan Sponsor, Plan Consultant, and internal teams to provide appropriate education solutions.
- Develop and implement education plans to maximize plan participation.
- Assist participants in making informed decisions about their retirement savings and overall financial goals.
- Present in-person and remote group meetings and one-on-one meetings for participants.
- Main point of contact for the plan sponsor and participant with education.
- Travel necessary as needed throughout the geographic territory and occasionally further with up to 25% of travel expected

**EXPERIENCE / QUALIFICATIONS**

- Ability to work successfully with all levels within an organization ranging from key decision makers to day-day-to-day administrative staff.
- Series 65 or 66
- CFP preferred
- Experience with financial services and products including qualified retirement plans, investment securities, credit refinancing services and insurance
- Excellent presentation and communication skills; a proven ability to explain complex topics and motivate others to take immediate action.
- Project management skills including the ability to coordinate with multiple vendors, clients, and associates to deliver expected services on time and on budget.

