

Title: Sales Assistant

Location: Remote

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 **Retirement Sales Assistant** plays a key role in supporting the centralized sales operations team by managing projects, preparing reports, and assisting in the creation of marketing materials such as flyers, presentations, and other collateral. This position requires a proactive, tech-savvy self-starter with strong business acumen, exceptional organizational skills, and a keen eye for design. A successful **Retirement Sales Assistant** will thrive in a dynamic, collaborative environment and take initiative to drive efficiency and growth within the team.

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

JOB DUTIES

- Meet or exceed Service Level Expectations (SLEs) set by the Director.
- Design and prepare polished reports, presentations, flyers, and other marketing collateral.
- Manage multiple priorities effectively while maintaining exceptional attention to detail.
- Research prospect opportunities using tools, like the DOL's 5500 database and fee benchmarking platforms.
- Accurately record sales activity and pipeline progress in Salesforce.
- Maintain clear and proactive communication with all project stakeholders.
- Take initiative to identify process improvements and contribute to team success.
- Interact confidently with all levels of the organization via phone, email, or in-person.
- Submit expense reports efficiently.
- Organize and schedule appointments, meetings, and travel (flight, hotel, etc.).
- Other duties as assigned, such as assisting in training other team members.

EXPERIENCE / QUALIFICATIONS

- Proven ability to take initiative and work independently.
- Strong organizational skills with a keen eye for detail.
- High business aptitude and a desire to further develop skillset.
- Proficiency in Microsoft Office Suite (PowerPoint, Word, Excel) and experience with design tools such as Canva, Adobe Creative Suite, or similar platforms.
- Ability to assist in the creation visually appealing and professional marketing materials (e.g., flyers, presentations, infographics).
- Ability to learn new tools, systems and processes quickly.
- Excellent written and verbal communication skills.

- Ability to adapt to changing priorities in a dynamic environment.
- Prior experience in sales support, project management, or a related field is preferred but not required.
- Interest in technology, marketing, or financial services is a plus.
- Project management skills including the ability to coordinate with multiple vendors, clients, and associates to deliver expected services on time and on budget.

REQUIREMENTS/REQUIRED EXPERIENCE

- 3+ years' experience in professional services preferred
- B.A. or B.S. from an accredited university a plus
- Intermediate to Advanced MS Office user
- Extremely detail-oriented
- Ability to comprehend, analyze and interpret documents
- Effective problem solving with minimal oversight
- Excellent written and verbal communication skills
- Strong organizational skills with the ability to multi-task
- Excellent time management skills and the ability to prioritize work
- Salesforce or other CRM experience