CREATIVE PLANNING®
RETIREMENT SERVICES

Title: Financial Wellness Consultant

Location: National

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** is responsible for delivering high-quality financial education services to 401(k) plan participants and clients of Creative Planning. This role combines participant-focused education delivery with relationship-centric financial planning support, helping individuals make informed decisions about their financial lives and, when appropriate, connecting them with Creative Planning's comprehensive wealth management services for deeper guidance.

The **Financial Wellness Consultant** executes strategic education programs, provides guidance in one-on-one and group settings, and acts as a primary relationship manager for assigned clients and plan sponsors - identifying participant needs that extend beyond workplace retirement planning and making thoughtful referrals to Creative Planning's broader team to ensure each individual receives the right level of support.

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

JOB DUTIES

- Serve as the primary point of contact for designated plans, participants, and clients, providing proactive financial education and advisory support.
- Collaborate with internal teams, plan sponsors, and consultants to identify needs and deliver targeted education strategies, including annual plans that drive engagement, plan health, and retirement readiness.
- Lead group workshops, webinars, and one-on-one consultations on retirement planning, investing, insurance, budgeting, debt management, and overall financial wellness.
- Provide holistic financial guidance - covering investments, insurance, tax considerations, and estate planning, and make thoughtful referrals to Creative Planning's wealth management team when deeper support is appropriate.
- Champion the firm's "No Participant Left Behind" philosophy by empowering individuals to take informed action toward their financial goals.
- Support business development efforts, represent the education team in client and finalist meetings, and contribute to enterprise growth initiatives.
- Oversee accurate and timely service delivery while maintaining a positive, solutions-oriented approach in a dynamic environment.

- Travel up to 50% within the assigned geographic territory.

EXPERIENCE / QUALIFICATIONS

- Series 65, 66, or CFP®
- 5+ years of financial services experience, including direct client interaction.
- Experience with qualified retirement plans, investment products, and general personal finance concepts.
- Proven ability to present complex topics in a clear, compelling, and actionable way.
- Strong communication, presentation, and relationship management skills.
- Project management experience with the ability to coordinate with multiple stakeholders.
- Ability to work successfully with all levels of an organization, from key decision-makers to frontline staff.
- Bachelor's degree, preferably in finance, business, marketing, or related field.