CREATIVE PLANNING
RETIREMENT SERVICES

Title:	Consultant 1
Location:	East Region & Midwest Eastern Time Zone & Central Time Zone
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 is a leading retirement plan advisor to employers and employees nationwide providing fiduciary consulting, investment advice, compliance support, and employee financial education.

The **Consultant** is responsible for delivering high-quality, efficient service to both internal and external clients through strategic and day-to-day management of a designated group of accounts, consisting of, primarily or entirely, clients participating in or transitioning into one of our Pooled Employer Plans (PEPs). This includes maintaining a dedicated portfolio of core accounts and, when assigned, collaborating with an Account Specialist, Senior Consultant and/or Team Lead.

The **Consultant** will continue to develop knowledge in retirement and investment, enhance consulting skills, and lead projects and client service teams for assigned clients. The role involves PEP transition management, supporting client design, and strategy needs with guidance from senior team members as required. Conversant in all aspects of client retirement plan and fiduciary process lifecycle and has an ability to lead a client committee meeting.

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

JOB DUTIES

- Manage projects as an individual contributor, ensuring accuracy and completeness of own work
- Provide leadership on tasks with oversight, delivering well-vetted recommendations for team and client consideration
- Maintain Salesforce records for assigned accounts
- Request client materials from Centralized Services, following the required protocols
- Review meeting materials provided by Centralized Services to ensure accuracy
- Attend and lead client meetings, coordinating with recordkeepers in advance as necessary
- Handle follow-up responsibilities, including preparation of meeting minutes, implementation of fund changes, and execution of match calculations
- Oversee client projects such as RFPs, M&A activity, and plan consolidations
- Help facilitate transitions into our Pooled Employer Plan (PEP) solutions and be able to speak to the nuances of these solutions
- Support due diligence projects and strategic planning activities
- Seek oversight and assistance for complex tasks as needed

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- Series 65/66 license or ability to obtain within 90 days
- 3-5 years' experience in professional services, preferably in investment services
- Exceptional verbal, written, and interpersonal communication skills for effective internal and external communication
- Strong organizational abilities with high attention to detail
- Proven ability to handle competing tasks, with ongoing development in efficient and effective time management
- Ability to collaborate effectively with internal team members
- Receptiveness to constructive feedback and a growth-oriented mindset
- Experience in managing overall client relationships
- Confidence and consultative skills in presenting quarterly client materials to clients
- Developing skills in business expansion and client engagement