Title: Senior Consultant

Location: Southeast

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 **Senior Consultant** provides high-quality service to external clients through strategic and day-to-day management of Core Plus Accounts. Supported by an Account Specialist as assigned, the role ensures exceptional service delivery and client satisfaction.

With in-depth retirement and investment knowledge, the **Senior Consultant** demonstrates leadership, autonomy, and consulting expertise. They inspire and mentor junior associates, manage strategic client and vendor relationships, and leverage business acumen to strengthen client partnerships while maintaining service excellence.

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

JOB DUTIES

- Maintain Salesforce records for assigned accounts
- Attend and lead client meetings, coordinate with recordkeeper in advance as needed
- Request client materials from Centralized Services or leverage Account Manager support, following required protocols
- Review meeting materials for accuracy and delegate effectively to Account Specialists when appropriate
- Manage follow-up tasks, including meeting minutes, fund changes, and match calculations
- Lead client projects, including RFPs, M&A activity, plan consolidations, due diligence, and strategic initiatives
- Conduct fee conversations with clients regarding recordkeeping and advisory fees, addressing both reductions and increases as needed
- Lead team members in managing overall client relationships
- Coach and mentor team members, contribute to national training initiatives, and explore national leadership opportunities, such as leading project or study groups

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- Series 65 license or ability to obtain within 90 days

- 10+ years' experience in in investment or financial services
- Exceptional verbal, written, and interpersonal communication skills for effective internal and external communication
- Strong organizational abilities with high attention to detail and the ability to manage competing tasks efficiently and effectively
- Ability to collaborate effectively with internal teams
- Receptive to constructive feedback and a commitment to continuous improvement
- High level of confidence in delivering investment reviews and leading committees to make decisions
- Knowledge of the recordkeeper vendor market, including general service offerings and market focus areas
- Highly developed technical consulting skills, including expertise in M&A, plan design, and correcting operational failures
- In-depth knowledge of additional retirement areas such as Non-Qualified (NQ) plans, PEPs, Defined Benefit plans, and others