Title: Client Engagement Manager

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

The **Client Engagement Manager** is responsible for supporting Creative Planning's participant education and financial wellness initiatives by managing relationships with plan sponsor contacts, coordinating participant engagement and education programs, and ensuring effective communication and reporting within the Live Well ecosystem. This role partners with internal teams to enhance participant engagement, resolve service issues, and support client objectives within the retirement plan and wealth management space.

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

JOB DUTIES

- Manage plan sponsor relationships within the Live Well ecosystem.
- Serve as the primary contact for client service, program support, and relationship management.
- Coordinate on-site and virtual participant education sessions with Financial Wellness Consultants.
- Develop and support participant communication and engagement strategies.
- Monitor and report platform usage, engagement, and program results.
- Support client reviews, committee meetings, sales finals, and participant workshops.
- Coordinate with internal teams to resolve client, plan, vendor, or service-related issues.
- Manage program materials, deliverables, timelines, and client commitments.
- Maintain client activity and program information in Salesforce and internal systems.
- Stay current on retirement plan trends, regulations, and financial wellness best practices.

EXPERIENCE / QUALIFICATIONS

- Bachelor's degree or equivalent industry experience.
- 5+ years of professional experience.
- Retirement plan, financial wellness, wealth management, or related industry experience.
- Experience in client service, relationship management, account management, or program support.
- Strong understanding of retirement plan services, participant engagement, and industry best practices.
- Strong presentation, facilitation, and communication skills.

- Ability to manage difficult conversations and provide proactive solutions.
- Collaborative, detail-oriented, professional, and client-service focused.
- Salesforce or CRM experience preferred.
- Series 65 or 66 preferred, but not required.

Salary Range: $100,000 to $140,000 + bonus