



## CREATIVE PLANNING

Title: Director of Client Development

Location: Overland Park, Kansas

Job Description: **JOB SUMMARY**

If you enjoy the sales and onboarding process without cold calling, we have the role for you! Searching for highly motivated sales-driven financial advisors to take on the role of **Director of Client Development** with Creative Planning. In this pivotal role, your sole focus is client acquisition. You will meet virtually with qualified prospects delivered through our marketing lead channels to learn more about the prospective client's needs and share with them our breadth of services.

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

**JOB DUTIES**

- Meet **virtually** with incoming prospects who reached out to Creative Planning
- Collaborate with internal Account Executive team who sets the initial client meeting for you
- Hold a meaningful introductory meeting with client leads to explore if Creative Planning is a good fit for their needs
- Communicate the depth of services Creative Planning offers
- Help facilitate client onboarding

**REQUIRED EXPERIENCE / QUALIFICATIONS**

- CFP® certified, Series 65, or Series 66
- 10 years of financial services experience including direct sales with investment clients
- Solid knowledge and ability to present complex financial topics to clients
- Ability to handle highly detailed work with a great degree of accuracy
- Bachelor's degree, preferably in a related field such as finance, business, or marketing

**PREFERRED EXPERIENCE / QUALIFICATIONS**

- Graduate degree consisting of JD, MBA, or CPA

**TECHNICAL SKILLS**

- Proficiency in MS Word, Excel, and PowerPoint
- Proficiency with Zoom and Salesforce
- Ability to adapt and integrate new technology quickly