CREATIVE PLANNING

Title: Estate Associate

Location: Overland Park, KS

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 addresses all aspects of financial planning from estate planning, tax strategy and risk management to retirement, education, and charitable planning – using all in-house specialists.

The **Estate Associate** is responsible for supporting the administration of trust and estate accounts through payment processing, asset coordination, client and beneficiary communications, and file management. This role requires exceptional organization, attention to detail, and the ability to manage multiple priorities in a client-focused environment.

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

JOB DUTIES:

- Enter and process bills for payment approval
    - Transfer utilities and other monthly payments
    - Track monthly payments due and pay timely
    - Sort and process incoming bills
    - Input Salesforce cases to raise cash for bill payments
    - Review and maintain funds in the account so as to not overdraft the account
- Assist with organizing and marshalling trust and estate-owned assets
    - Prepare asset spreadsheets for the file
    - Contact financial institutions via telephone, email, and written correspondence to gather necessary documentation and marshal in assets
    - Identify and gather requisite documentation to send to financial institutions
    - Prepare letters of instruction, necessary forms, etc. as needed
    - Track expected incoming funds
- Assist in communications with beneficiaries and co-trustees
    - Process and send outgoing mailings to clients and beneficiaries
    - Schedule and attend meetings as needed.
    - Answer incoming calls appropriately, notate accurate messages from the same, and be able to assist clients on administrative matters
- Maintain organized filing systems
    - Classify and file client documents in client files
- Perform simple drafting tasks based on templates only on an as-needed basis
    - Prepare acceptances, certifications of trust, letters to beneficiaries, releases, receipts, etc.
- Special projects and other duties as assigned

REQUIRED EXPERIENCE/QUALIFICATIONS:

- Bachelor's Degree strongly preferred
    - Advanced education/certifications a plus
- High-level multi-tasker
- Excellent communication skills
- Exceptional organizational and time management skills
- Ability to foster positive client relationships
- Ability to represent the organization and the trust company in a professional and positive manner
- Open to development and desire to expand responsibilities
- Proficiency in Microsoft Office, especially Microsoft Excel.
- Keen attention to detail.
- Ability to manage multiple priorities.
- Ability to adapt to the needs of a growing business.