



CREATIVE PLANNING

Title: International Wealth Manager

Location: United States, Remote

Job Description: **JOB SUMMARY**

The **International Wealth Manager** works directly with clients to develop and implement strategies to address their financial, investment, insurance, tax, and estate planning needs often in a dual-jurisdictional, multi-currency environment. They are responsible for business development, client retention and ongoing client follow up and relationship maintenance. The Wealth Manager is the point person for all client relationships and must have the ability to present the services offered by Creative Planning in a clear and concise manner. Success in this role will be measured by a variety of factors, including assets under management, asset inflow/outflow, retention rate, referrals, average billing rate & cross-border expertise. Wealth Managers are expected to contribute to the marketing efforts of the organization as well by writing/updating articles and contributing to the overall knowledgebase of the International team.

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

JOB DUTIES

- Serves as the primary point of contact for wealth management clients
- Assists in the creation, delivery, execution and management of complex financial plans
- Works with clients to implement all aspects of their comprehensive financial planning recommendations, including using in-house and third-party specialists
- Maintains a positive attitude, courtesy towards colleagues, and a willingness to adapt in a rapidly changing environment
- Contributions to team knowledge and research efforts on complex cross-border subjects; willingness to cooperate with and assist colleagues
- Obtain referrals from clients; convert leads to clients effectively
- Aggregate client assets
- *Communicate with clients, following the 50/1 standard*
- Ensure clients utilize Creative Planning's other services (law, tax, etc.) as are appropriate for the client; build relationships with third-party experts where needed
- Adhere to fiduciary standard when advising clients, act with integrity and adhere to the company's policies
- Seek knowledge on cross-border matters; attend and conduct internal training
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Series 65 (or equivalent)
- 5 – 7 years of financial services experience including direct sales with investment clients
- Demonstrated experience serving cross-border clients, including, but not limited to, understanding U.S. expat taxes, interpreting U.S. income and estate tax treaties, and counseling clients on investment solutions that are tax efficient across tax jurisdictions
- Solid knowledge and ability to present complex financial topics to clients
- Strong and clear communication skills
- 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
- Ability to travel as needed

PREFERRED EXPERIENCE / QUALIFICATIONS

- CFP® Certificate
- Graduate degree or professional designations consisting of JD, MBA or CPA
- 8 or more years of financial services experience to include direct sales with investment clients
- Personal experience working in another tax jurisdiction

TECHNICAL SKILLS

- Understanding and previous use of Windows 10
- Proficiency in MS Office (notably Outlook, Excel and Word), Zoom and Teams
- Understanding of mobile operating systems such as Android or IOS
- Ability to adapt and integrate new technology quickly
- Knowledge of taxes, estate planning concepts and interaction of the U.S. and non-U.S. tax rules