CREATIVE PLANNING
RETIREMENT SERVICES

Title: Managing Director – Retirement Solutions

Location: Cleveland/Columbus/Cincinnati, Ohio

Job Description: **JOB SUMMARY**

The **Managing Director** is responsible for generating and closing new business opportunities for our mid/large market retirement plan advisory offering. Managing Director partners with our client service team to deliver plan services through on-going client relationship management.

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

JOB DUTIES

- Develop and execute a business development plan
- Initiate prospective clients via direct marketing, COI's and personal referral network
- Manage prospects through sales process and convert to new clients
- Maximize revenue growth of existing client relationships by introducing new offerings (i.e. investment advice, wealth management)
- Client advocate across all service channels (i.e. institutional, financial planning / wellness, wealth management, etc.) and single point of accountability for any referral partners
- Establishing client fee levels commensurate with requested services, client service model, and profitability targets
- Primary liaison for assigned referral partners and maximize referral activity
- Provide mentorship to other managing directors, as assigned
- Ultimately responsible for client satisfaction; partner with client service team to provide strategic direction

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's degree
- Series 63/65 or 66
- 10 years retirement plans sales experience
- Proven track record of generating and closing new business
- Highly adept at presenting complex topics to prospective clients
- Ability to excel in a team environment
- Meticulous attention to detail and accuracy
- Proficient in Microsoft applications

PREFERRED EXPERIENCE / QUALIFICATIONS

- Any of the following: MBA, CRPS, CRSP, CRC, ARPC or similar