

Title: **Salesforce Solutions Architect - Retirement Services**

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

We are seeking a passionate and highly driven individual to join the Salesforce Solutions team as the dedicated **Salesforce Solutions Architect** for our Creative Planning Retirement Services and Financial Wellness teams. Creative Planning Retirement Services advises plan sponsors on employer-sponsored retirement plans, and Financial Wellness Consultants deliver education to the employees of those plan sponsors. This role designs, builds, and supports the Salesforce solutions that both teams rely on every day, across two Salesforce orgs and multiple integrations. You will translate retirement business and participant education work needs into scalable, secure, and well-documented Salesforce solutions. We operate in a dynamic, fast-paced environment, and this role will play a vital part in the ongoing development and expansion of Salesforce across Creative Planning.

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

JOB DUTIES

- Serve as the primary Salesforce partner to Creative Planning Retirement Services leadership, Plan Consultants, and Financial Wellness Consultants, understanding their processes and recommending the right solution
- Design, build, and maintain Salesforce solutions across two orgs, including data models, Flows, security, and reporting, following sound architecture and governance practices
- Gather, analyze, and document business requirements, and lead solution design from concept through testing, deployment, and adoption
- Design and support integrations between Salesforce, Marketing Cloud, third-party applications, and internal systems, and evaluate the tradeoffs of each approach
- Support the participant to wealth client journey by improving how leads, plan, and participant data move between systems and how outcomes are tracked
- Build and maintain reports and dashboards that give leadership and consultants reliable KPIs on service delivery, participant engagement, and conversion
- Own data quality and security for the supported orgs, including sharing, access controls, and data stewardship, in line with organizational and regulatory standards
- Support data migrations and system integration for acquired companies' CRMs

- Create and maintain training materials, documentation, and release notes, and train and support end users
- Develop and promote best practices for configuration, development, testing, and data integrity
- Continually review current processes and configurations and propose improvements

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's degree preferred
- 3+ years of Salesforce experience with a proven track record of successful projects and implementations
- Salesforce Administrator Certification required
- Advanced experience with Salesforce Flow, data modeling, and security
- Working knowledge of Salesforce integration capabilities and third-party applications
- Strong troubleshooting, analytical, and problem-solving skills
- Strong written and verbal communication skills, including the ability to explain technical concepts to non-technical stakeholders
- Ability to prioritize simultaneous requests, meet deadlines, and manage laterally and upwards
- Ability to work independently and collaboratively
- Proactive mindset, comfort with change, and a desire to keep learning about Salesforce

PREFERRED EXPERIENCE / QUALIFICATIONS

- Experience with retirement plan services, such as plan sponsor and participant data, recordkeeper relationships, plan consulting or fiduciary workflows, or participant education
- Experience using generative AI to improve business processes, documentation, reporting, or user support
- Marketing Cloud experience
- Experience with acquisition integration
- Experience with low-code integration tools such as Zapier