



CREATIVE PLANNING

Title: Wire Associate

Location: Overland Park, Kansas

Job Description: **JOB SUMMARY**

The **Wire Associate** works under the Wire Team Managers and the Director of Operations. The Wire associate's primary responsibility is to process wire requests upon the direction of the Wealth Manager or Financial Planner.

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

JOB DUTIES

- Accurately prepare, process, and track wire paperwork for new and existing clients
- Correctly process wire distributions to clients
- Successfully prioritizes and juggles multiple tasks with competing priorities
- Delivers quality customer service
- Consistently display strong communication skills, both written and oral
- Must remain calm under pressure, be a good listener and be able to make good business decisions considering impact to client and firm
- Acts as the liaison between Creative Planning and all custodians that we work with
- Ensure compliance with all regulatory guidelines
- Consistently meets or exceeds deadlines
- Works well independently and within a team environment with minimal supervision
- Exemplifies Creative Planning's culture and values
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- No experience necessary

PREFERRED EXPERIENCE / QUALIFICATIONS

- Prior experience in financial services field or banking field

TECHNICAL SKILLS

- MS Office
- Windows