CREATIVE PLANNING

Title: International Financial Planner

Location: United States, Remote

Job Description: **JOB SUMMARY**

The International Financial Planner is responsible for the last five of six steps in the CFP Board's Financial Planning Process. This individual interacts with clients daily to gather

information, analyze information, develop recommendations, implement recommendations, and monitor the financial plans of their clients. The Planner collaborates with one or more Wealth Managers in the firm to deliver expert, comprehensive financial advice to their clients. Financial Planners at Creative Planning also help clients with tax and estate planning strategy in consideration of U.S. and foreign laws as well as onboarding new planners and wealth managers.

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

JOB DUTIES

- Participates and conducts client meetings
- Prepares the Financial Planning recommendations, incorporating language that helps clients navigate U.S. and/or foreign tax laws
- Collaborates with members from each business line to best serve the client and builds relationships with outside professionals in other countries as needed
- Manages accuracy of internal Client Relationship Management (CRM) software
- Implements Financial Planning recommendations
- Monitors the Financial Plan and communicates with clients
- Updates Financial Planning recommendations
- Grey/overlapping tasks between department areas
- All other duties as assigned
- Assist onboarding new Financial Planners and Wealth Managers

REQUIRED QUALIFICATIONS / EXPERIENCE

- CFP® Certificate
- Relevant Educational Background (Finance, Accounting or Business Administration)
- 3 years financial services industry experience
- Lived and/or worked outside the United States, and ideally had to file U.S. taxes as a bona fide resident of a foreign country
- Pass internal proficiency exams

- Series 65 (or equivalent) attained within 120 days

PREFERRED QUALIFICATIONS / EXPERIENCE

- Previous financial planning experience

TECHNICAL SKILLS

- Microsoft Office proficiency
- Keen attention to detail
- Ability and willingness to read tax treaties