

Title: Account Specialist

Location: Various

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

The **Account Specialist** delivers high quality and efficient service to both internal and external clients through the day-to-day management of an assigned group of accounts. The Account Specialist works under direct supervision to support Consultants and Senior Consultants on assigned Plans.

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

JOB DUTIES

- Maintain Salesforce records on assigned accounts
- Request client materials
- Serve as a resource for assigned clients
- Review meeting materials for accuracy
- Assist in client relationship management process
- Attend client meetings as needed
- Coordinate resources for client meetings, preparation, and projects
- Assist with follow-ups (e.g., meeting minutes, fund changes, match calculations)
- Assist with client projects (e.g., RFPs, M&A activity, plan consolidation)
- Assist with due diligence projects and strategy
- Field and resolve client questions and requests via phone and e-mail
- Must be able to interact and communicate at ease with all levels within the organization via phone, email, and/or in-person
- Other duties may be assigned.

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- 2-3 years' experience in professional services, preferably in investment services
- Exceptional verbal, written and interpersonal skills required
- Extremely detail-oriented
- Series 65 license or ability to obtain within 90 days
- Customer service skills
- Ability to comprehend, analyze and interpret documents
- Effective problem solving with minimal oversight

