



Title: **Billing Specialist**

Location: Overland Park, KS

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.

The Billing Specialist's primary responsibility is to ensure all existing clients are billed accurately.

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

JOB DUTIES

- Facilitate quarterly billing at all major custodians
- Reconcile account data between the billing database and multiple custodians
- Perform detailed audits of the billing database to guarantee accurate billing
- Perform quarterly billing forecast reviews
- Update billing management software daily
- Research and provide timely solutions to submitted requests
- Complete complex audits to confirm valid billing based on account setup
- Special projects and additional duties as assigned

EXPERIENCE / QUALIFICATIONS

- Bachelor's degree
- 2+ years of billing and/or data management experience
- High level of attention to detail
- Advanced knowledge of Microsoft Excel
- Exceptional analytical skills
- Excellent written and verbal communication skills
- Ability to stay focused and organize workflow while achieving exceptional quality
- Commitment to teamwork and excellence

PREFERRED EXPERIENCE / QUALIFICATIONS

- Portfolio Accounting software experience (i.e. Orion Advisor Services, Advent/Black Diamond, Investnet Tamarac, Morningstar Office)

TECHNICAL SKILLS

- Proficiency in Microsoft Office
- Ability to quickly learn and adapt to new systems and technology