



# CREATIVE PLANNING

Title: Brand Ambassador

Location: Overland Park, KS

Job

Description:

## **JOB SUMMARY**

The primary goal of the **Brand Ambassador** is to make an amazing first impression for prospective clients wanting to get more information about Creative Planning.

The Brand Ambassador will manage inbound email and phone calls from prospective clients. The Brand Ambassador will explain the value of working with Creative Planning and discuss if our solution is a good fit for their needs.

## **JOB DUTIES**

- Interact with prospective clients to identify needs and suitability for our financial planning, investment management, or other services
- Explain all of Creative Planning's services and answer basic questions to prospective clients
- Assign to appropriate Wealth Manager based on criteria obtained during initial contact
- Support and field questions and concerns from prospective Clients
- Contact inactive individuals who have not engaged Creative Planning's services
- Schedule appointments between prospective clients and Wealth Managers
- All other duties as assigned

## **REQUIRED EXPERIENCE / QUALIFICATIONS**

- Exceptional written and verbal communications skills
- Excellent interpersonal skills
- Basic knowledge of the financial industry
- High-level multi-tasker
- Creative thinker, problem solver
- Efficient, extremely detail oriented and accurate

**PREFERRED EXPERIENCE / QUALIFICATIONS**

- 1 – 2 years' experience in financial industry
- Financial Planning knowledge and experience
- Knowledge of standard office equipment

**Technical Skills:**

- MS Office/Windows
- Database management
- Multi-line phone system