



CREATIVE PLANNING

Title: Business Development 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. 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 **Business Development Specialist** provides direct support to 2-3 Managing Directors in the design and execution of sales strategy to grow the MDs Retirement qualified and non-qualified book of business.

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

JOB DUTIES

- Effectively partner with Retirement Services Managing Directors to initiate and close new business opportunities
- Serve as a subject-matter expert for qualified and non-qualified retirement plans; expertise includes plan governance, compliance, administration, investments, design, and employee education
- Leverage verbal and written communication to develop sales and key client materials
- Assist in development and execution of business plan to achieve MD growth objectives
- Developing and maintaining strong and trusted relationships among key strategic partners
- Coordinate preparation of RFP responses and proposals
- Develop, organize and assist in the delivery of marketing collateral, seminars, presentations and events
- Support social media strategy
- Leverage Salesforce and web-based tools to manage pipeline and generate reports
- Maintain a thorough knowledge of industry and products available in the market
- Analyze complex data, interpret, and communicate findings
- Assist with new client on-boarding process and transition to service team
- Develop relationships with Centers of Influence in the marketplace
- Operate as an effective team member with both internal and external teams
- Some travel required
- Other special projects, as assigned

EXPERIENCE / QUALIFICATIONS

- Applicable B.A. or B.S. from an accredited university
- Advanced working knowledge of the retirement industry

- 5+ years of experience preferred
- Applicable securities licensing (Series 63/65 or 66)
- Experience in marketing and servicing employer sponsored retirement plans
- Strategic self-starter with high degrees of resourcefulness, drive, and personal achievement
- High degree of comfort learning and adapting to new technology / software
- Organizational and time management skills required
- Work in a collaborative team environment with ability to delegate tasks effectively
- Salesforce experience a plus
- Intermediate to Advanced MS Office user (Excel, Word, Power Point)
- Experience using LinkedIn and other business-focused social media platforms for marketing purposes
- Ability to compile, analyze, and interpret financial information and data to facilitate decision making
- Successful use of professional, tactful negotiation and persuasion skills to achieve objectives
- Personal presence to interface with top management of other businesses, representing Creative Planning in the highest professional manner