

Title: Business Process Specialist, RFP Support

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. 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 role of Business Process Specialist, Request for Proposal (RFP) Support will be primarily responsible for building processes that maximize the efficiency of our teams. You will work alongside other specialists in supporting the functions of the centralized services business process department. Those areas include but may not be limited to RFPs, onboarding, accounting, and investment analysis.

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

**Job Duties:**

- Work directly with the Retirement Services division of Creative Planning
- Review recordkeeper RFP responses for reasonableness and accuracy
- Maintain the centralized RFP database and the annual RFI
- Create processes and procedures to ensure quality control and integrity of all RFP data
- Act as the main contact for all client RFPs and RFP database support
- Work with other business areas to identify and target processes for automation
- Create connectivity from several different information systems to create connectivity and improve insights from the firm's data
- Provide best in class customer service to internal and external business partners and clients
- Meets or exceeds the Service Level Expectations (SLEs) set by the Business Process Leader
- Keeps an open line of communication with all stakeholders including sales, consulting, operations, and finance leadership
- Evaluates feedback from stakeholders and assists in development of plan for areas of improvement and optimization

- Must be able to interact and communicate at ease with all levels within the organization via phone, email, and/or in-person
- Takes detail-oriented approach to projects and tasks
- Effective problem solving with minimal oversight
- Other duties may be assigned.

**Required Experience/Qualifications:**

- B.A. or B.S. from an accredited university
- 2+ years' experience in professional services
- Intermediate to Advanced MS Office user
- Experience in automating tasks and procedures is a plus
- Willing to build expertise in areas with little to no knowledge required
- Strong organizational and time management skills to prioritize heavy individual workload to meet time sensitive deadlines.
- Ability to compile, analyze and interpret financial information and data to facilitate decision making.
- Demonstrated ability to work independently, as well as part of a team with minimal supervision.
- RFP database experience a plus
- Experience in the retirement industry a plus