



CREATIVE PLANNING

Title: **Business Consultant/ Virtual CFO**

Location: Any Location/Hybrid/Remote

OVERVIEW

BerganKDV recently joined Creative Planning, one of the nation's top independent wealth management and investment advisory firms, also providing a comprehensive suite of consulting, tax and advisory services for business and institutions. This is a unique opportunity to join a top tier firm paving the way for unparalleled client and team member experiences.

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

JOB SUMMARY

As a Business Consultant / Virtual CFO, this position will work directly with clients to help manage their accounting and finance department, prepare financial reporting, perform financial analysis and advise on business matters. This position blends high level strategy with the tactical reviewing and monitoring of details to effectively manage financial information and solve accounting issues for our clients.

JOB DUTIES

Provide guidance and thought leadership on accounting, financial, and general advisory aspects of the client's business, including:

- Appropriate utilization and efficiency of software applications
- Development of budgets, forecasts, and KPIs
- Process improvement, standard operating procedures, and industry-specific best practices
- Coordinate and participate in year-end income tax planning and strategies.
- Ability to adapt to client needs by providing immediate short-term solutions while working toward implementation of long-term goals.
- Set and meet defined deadlines on projects with clients.
- Maintain open and honest fee discussion with clients while maintaining appropriate engagement profitability.
- Proactively participate in pursuing new business for this service.

REQUIRED EXPERIENCE / QUALIFICATIONS

- 10+ years with both public accounting and private company experience.
- Familiarity with accounting systems; background with QuickBooks and Sage preferred.
- Experience delegating work and maintaining client and other COI relationships.

TECHNICAL SKILLS

- MS Office /Windows experience particularly financial modelling and data management in Excel
- Strong analytical and problem-solving abilities
- Excellent written and verbal communication skills

EXPLORE THE WORKPLACE OF THE FUTURE

Together, we are building the nation's preeminent wealth and business advisory practice, by providing a comprehensive suite of services that support and empower individuals, families,

institutions and businesses. Our values drive our decisions, and our passion is putting our clients at the center of everything we do.

Creative Planning Differentiators:

- Day One Benefits Enrollment
- Growth Potential
- Close-Knit Collaborative Team
- Mentor Program
- Employee Referral Rewards
- Comprehensive Benefits Package
- Customized Career Paths
- Open Door Leadership Style
- Firm-wide Trips for All Team Members
- Creative Planning Cares

BENEFITS THAT GO BEYOND

We are proud to offer a competitive and comprehensive benefits package, with options designed to help you make the best decisions for yourself, your family and your career. Our competitive compensation package is catered to reward you for your performance and recognize you for the value you bring to our business. In addition, our total package includes medical and dental coverage, matching 401(k) plans, PTO, observed holidays and a range of programs and benefits designed to support your physical, financial and social well-being.

Creative Planning is an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

We will ensure that individuals with disabilities are provided reasonable accommodation to participate in the job application or interview process, to perform essential job functions, and to receive other benefits and privileges of employment. Please contact us to request accommodation.