



CREATIVE PLANNING

Title: HRIS Designer
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

The HRIS Designer position helps to ensure that the needs of customers are being satisfied. This position provides excellent customer service by resolving client issues via phone or email, within the current SLA timelines. Schedules projects that come through support calls or emails and works project deadlines are met. This position will assist with training and mentoring of new and existing team members on processes and procedures and will assist in creating and documenting processes.

JOB DUTIES

- Assist team members with Capital Assets and reconciliation of multiple accounts
- Complete Bank Confirmation and Prelim Spreadsheets for Accounts Payable and Payroll
- Complete Interest Revenue Tie Outs and review Bank Reconciliations.
- Assist with Financial Template Setups.
- Maintain a strong client focus, be responsive to client requests and develop/maintain productive working relationships with client personnel.

REQUIRED EXPERIENCE / QUALIFICATIONS

- Must be pursuing a bachelor's degree in accounting, business, or a related field
- Excellent interpersonal skills
- Strong written and verbal communication skills
- Strong analytical, teamwork and organizational skills
- PC proficiency, including spreadsheet, word processing and presentation software applications

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.