



CREATIVE PLANNING

Title: Individual Insurance Advisor

Location: Various

Job Description: **JOB SUMMARY**

The Creative Planning Insurance **Individual Insurance Advisor** will work with the Wealth Managers and directly with clients to implement insurance recommendations for individual life, Disability, or Long-Term Care Insurance. Additionally, they provide support in handling policy analysis and recommendations.

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

JOB DUTIES

- Provide policy analysis on life, disability, and long-term care contracts.
- Meet with and advise clients on policy-specific questions to gain a better understanding of their coverage.
- Help identify with advisors and clients where coverage is needed and convey the importance of those findings to clients.
- Assist Wealth Managers with implementing life, disability, and long-term care insurance recommendations.
- Request/prepare insurance proposals based on client needs or recommendations.
- Communicate with both clients and Wealth Managers as needed.
- Research/answer questions.

REQUIRED EXPERIENCE / QUALIFICATIONS

- Life & Health licensed
- High-level multi-tasker
- Excellent written and verbal communication skills
- Efficient, extremely detail oriented and accurate

PREFERRED EXPERIENCE / QUALIFICATIONS

- 2 – 3 years of experience in the life insurance industry
- 2 – 3 years of experience in the disability insurance industry
- 2 – 3 years of experience in the long-term care insurance industry

TECHNICAL SKILLS

- MS Office Proficiency/Windows 10 experience
- Knowledge of standard office equipment