

Title: Retirement Sales Assistant

Location: Dallas, Texas or Overland Park, Kansas

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. Lockton Retirement Services, an offering of 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 **Retirement Sales Assistant** will work alongside Business Process Specialists in supporting the functions of the centralized sales support team. In addition, the Retirement Sales Assistant may interact with associates in other areas including RFPs, onboarding, invoicing, revenue reconciliation, and other projects as determined by business needs.

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

JOB DUTIES

- Meets or exceeds the Service Level Expectations (SLEs) set by the business process leader
- Manage various projects simultaneously
- Prepare reports, presentations and marketing collateral
- Utilize existing tools to research prospect opportunities including pulling 5500 data and fee benchmarking
- Use Salesforce to accurately record sales activity and pipeline progress
- Keep an open line of communication with all project stakeholders
- Must be able to interact and communicate at ease with all levels within the organization via phone, email, and/or in-person
- Manage travel arrangements, such as booking flights, cars, and making hotel reservations.
- Submit and reconcile expense reports
- Organizing and scheduling appointments or meetings
- Assist in the training and development of other specialists
- Other duties may be assigned.

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- 2+ years' experience in professional services, preferably in investment services
- Salesforce or other CRM experience a plus
- Intermediate to Advanced MS Office user
- Extremely detail-oriented
- Ability to comprehend, analyze and interpret documents

- Effective problem solving with minimal oversight
- Excellent time management skills and the ability to prioritize work
- Excellent written and verbal communication skills
- Strong organizational skills with the ability to multi-task