



CREATIVE PLANNING

Title: Associate Financial Planner

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 addresses all aspects of financial planning from estate planning, tax strategy and risk management to retirement, education and charitable planning – using all in-house specialists.

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

JOB SUMMARY

The Associate Financial Planner's primary responsibility is to proactively seek out to take on as many financial planning tasks as possible from Financial Planners and Wealth Managers.

The Associate Financial Planner works directly with each financial planner in various administrative functions. The Associate works to ensure that the financial planners can make optimal use of their time supporting clients.

Associate Financial Planner has the following characteristics (or some combination)

- No CFP
- Has few years of professional planning experience
- Demonstrates competent analytical skills
- Demonstrates understanding of basic planning topics
- Frequently seeks assistance from other planners for planning- or process-related items (growth opportunity)
- Does not participate in client meetings (depending)
- Seen as an assistant by clients

- WM does not yield non-sales related activities to the planner (dashboards and/or follow-up only)