

Title: Account Specialist

Location: Atlanta GA or Kansas City

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 Planning is a leading retirement plan advisor to employers and employees nationwide providing fiduciary consulting, investment advice, compliance support, and employee financial education.

The **Account Specialist** delivers high quality and efficient service to both internal and external clients through the day-to-day management of an assigned group of accounts. In this role, the Account Specialist develop and acquire retirement and investment knowledge, build on practical application and consulting skills, and collaborate closely with the client team. Working under direct supervision, the **Account Specialist** supports Consultants and Senior Consultants in the administration of assigned plans.

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

JOB DUTIES

- Maintain and update Salesforce for assigned accounts
- Request client materials from Centralized Services as required
- Review meeting materials from Centralized Services for accuracy
- Attend client meetings at the direction of Consultants, take minutes, and coordinate internal and external resources for meetings and related projects
- Assist with client follow-ups, including meeting minutes, fund changes, and match calculations
- Support client projects such as RFPs, M&A activity, and plan consolidations
- Serve as a resource for assigned clients, responding to client questions and requests via phone and email in a timely manner
- Assist in the ongoing management of client relationships
- Other duties may be assigned

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- 2-4 years' experience in professional services, preferably in investment services
- Exceptional verbal, written, and interpersonal communication skills for effective internal and external communication
- Proficient in MS Word, Excel, and PowerPoint
- Strong organizational abilities with a high attention to detail
- Proven ability to handle competing tasks and manage time efficiently and effectively
- Willingness to develop and improve time-management skills
- Ability to collaborate effectively with internal team members
- Strong commitment to providing timely responses and meeting deadlines
- Positive attitude and openness to learning new skills and acquiring new knowledge
- Receptiveness to constructive feedback with a growth-oriented mindset

