



Title: Technology Advisor

Location: USA (Remote)

Description: About Us

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

Creative Planning is revolutionizing the wealth management industry by providing comprehensive financial planning and investment management services under one roof. Our innovative approach extends to our cutting-edge IT solutions, where our Managed Service Provider (MSP) team plays a crucial role in keeping our clients at the forefront of technological advancement.

As a division of Creative Planning, we have the unique advantage of focusing solely on delivering exceptional service without the typical MSP pressures. This allows us to build something truly special:

Our People & Leadership

- **Authentic Leadership:** Our management team leads rather than manages, taking feedback to heart and supporting your growth while avoiding micromanagement
- **True Team Environment:** We don't just talk about teamwork – we live it. Our technicians actively support each other, share knowledge, and collaborate across teams
- **Thoughtful Communication:** We protect focused work time while maintaining strong collaboration. We favor clear, written communication over impromptu calls, enabling deep work and thorough documentation

Our Approach to Growth

- **Technical Breadth:** We're one of the few MSPs with deep expertise in both Windows and Mac environments, offering diverse technical challenges
- **Continuous Learning:** We encourage self-study and professional development, providing opportunities to work with cutting-edge technologies
- **Career Advancement:** From participating in premium client teams to leading SMB accounts, we offer multiple paths for growth

Our Client Philosophy

- **Relationships First:** Technical solutions are just a byproduct of understanding client needs and being their trusted advisor
- **Balance of Independence:** While we collaborate as a team, we trust our professionals to take ownership and work independently

- **Deep Work Philosophy:** We maintain strong client relationships while protecting focused work time through thoughtful communication practices

Our Rewards & Benefits

- **Results-Focused Culture:** We skip the pizza parties in favor of meaningful recognition through raises and bonuses
- **True Remote Freedom:** Enjoy the flexibility of genuine remote work with the option to use office space when needed
- **Shared Success:** When we double our revenue, the whole team celebrates with a company-sponsored trip – including flight allowance, hotel accommodations for you and a guest

The Opportunity

Creative Planning Business Services helps companies transform how they operate through technology, data, and AI. Most firms send in either a strategist who cannot build or a builder who cannot see the bigger picture. The Technology Advisor is both. You set the technology direction for a portfolio of clients, and you're just as comfortable opening an editor and building the solution yourself.

This is a fractional technology executive role with an engineer's hands. In any given week, you might lead a vCIO conversation connecting technology investments to business outcomes, sketch the architecture for an AI-powered application, prototype a working proof of concept, and then review the code your team is shipping. You own the technology roadmap for each client, and you make the technical decisions that bring those roadmaps to life.

You'll work alongside a Technology Enablement Manager, who keeps engagements on track day to day, and a team of specialists who build AI workflows, automations, software, and data solutions. On client calls, you'll be the most senior technical voice in the room, using that credibility to instill confidence in clients while elevating the team around you.

You'll report to the Director of Data and Automation Solutions and work as part of a small, close-knit team that takes pride in delivering work that truly moves the needle. We value clear written communication, protected focus time, and meaningful recognition over unnecessary noise. If you've spent years building real software and have grown into someone clients trust for strategic guidance, this role gives you the opportunity to do both.

The right person for this role thinks like an engineer and carries themselves like an executive. You're energized by solving complex technical problems and by the moment a client realizes what's possible. You don't have to choose between building and advising—you excel at both, and this role is designed for exactly that combination.

What You'll Do

Client Advisory and Strategy

- Serve as the primary technology advisor and fractional executive for assigned clients, guiding decisions across software, AI, automation, data platforms, and cloud infrastructure
- Build and maintain technology roadmaps that tie directly to each client's business objectives and financial goals
- Lead executive-level conversations that connect technology investment to operational and financial performance

- Build long-term relationships where clients call you first because they trust your judgment

Solution Architecture and Hands-On Development

- Architect AI-powered applications and data solutions, from the first whiteboard sketch to a working system
- Write and prototype code yourself to prove out approaches, unblock the team, and set the technical direction others build against
- Stay hands-on with modern AI development, including LLMs, agents, and automation, so your technical guidance is grounded in what actually works today

Project Leadership and Delivery

- Own the technical success of multiple concurrent engagements spanning automation, analytics, and AI-powered software
- Partner with the Technology Enablement Manager to keep scope, budget, and timelines aligned across the portfolio
- Drive adoption of standardized delivery frameworks so every client gets a consistent, high-quality experience
- Own adoption, ROI, and the health of each engagement

Business Development and Growth

- Expand existing client relationships through consultative, value-based engagement rather than hard selling
- Generate new opportunities through your personal and professional network, partnerships, and visibility in the market
- Work with the Director to shape proposals, scopes of work, and client growth plans
- Spot opportunities for new services and offerings as client needs and technology evolve

Thought Leadership and Enablement

- Deliver executive briefings, client workshops, and talks at industry events
- Mentor the internal team, raising the technical bar and helping specialists grow into stronger builders and advisors
- Translate what is happening at the edge of AI and software development into practical guidance clients can act on

Technical Skills & Experience

- 10+ years of experience spanning software engineering and technology strategy, with a track record of shipping real production software
- Strong full-stack engineering background, comfortable across application code, APIs, cloud services, and data pipelines
- Hands-on experience building with modern AI, including LLMs, agents, and automation, and a clear sense of where the technology is genuinely useful versus hype
- Proven ability to architect systems and still get into the code when it matters, rather than only directing from a distance
- Business acumen to translate technology into measurable outcomes, and the executive presence to make that case to leadership
- Experience advising clients or stakeholders as a trusted technology executive, whether as a vCIO, consultant, engineering leader, or founder
- Exceptional communication, equally at home in a client boardroom and a technical design review
- Comfortable managing multiple concurrent engagements without letting quality or relationships slip

- Bachelor's degree in Computer Science, Information Systems, or a related field, or equivalent experience earned by doing the work
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What Sets You Apart

- **Builder Who Advises:** You can sit in a strategy conversation with a CEO in the morning and ship working code in the afternoon. Neither one feels like a stretch, and clients trust your strategy more because they know you can build it.
- **Technical North Star:** When the team is unsure which approach to take, they look to you. You make the hard technical calls, set the standards, and take responsibility for quality across everything the practice builds.
- **AI Pragmatist:** You are genuinely excited about AI-powered development, but you are not fooled by demos. You know what holds up in production, and you steer clients toward what will actually work rather than what sounds impressive.
- **Straight Shooter:** You give clients the real picture, including the parts they may not want to hear, with context and a plan. That honesty is exactly why they keep you close.
- **Perpetual Learner:** The tools change every few months and that energizes you. You stay current not because you have to, but because you cannot help wanting to know how the new thing works.
- **Multiplier:** You leave every engagement and every teammate better than you found them. Your instinct is to raise the level of the people and systems around you, not just to do the work yourself.

Salary Range: Up to \$150,000