



Title: Associate Financial Wellness Representative

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

The **Associate Financial Wellness Representative** will primarily assist retirement plan participants with understanding how to access financial wellness tools and managed money solutions available to them. The role will consist of taking inbound calls and conducting outbound communications to participants that may need our assistance.

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

JOB DUTIES

- Embrace our vision of "No Participant Left Behind," ensuring support for every participant in the Plan, regardless of their financial stage.
- Conduct outreach campaigns to help in-plan participants who are enrolled in managed money access their online account and set up their profile.
- Conduct outreach campaigns to help in-plan participants who are eligible but not enrolled in managed money to access their online account and set up their profile.
- Handle inbound and outbound calls and emails to educate plan participants about their financial wellness tools and managed money solutions available to them.
- Guide participants in making well-informed decisions regarding their retirement savings and overall financial objectives.
- Conduct virtual one-on-one sessions with participants.
- Work a minimum of 3 days per week in a Creative Planning office.
- Aim to localize meetings geographically, with occasional travel as required.

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university preferred.
- Ability to work successfully with all levels within an organization ranging from key decision makers to day-day-to-day administrative staff.