

Title: Business Process Specialist, Onboarding

Location: National (West/PST)

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 **Onboarding Business Process Specialist** will work alongside other specialists in supporting the functions of the centralized services business process department. Those areas include but may not be limited to 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
- Onboarding of all institutional retirement accounts
- Responsible for preparing contracts, amendments, and exhibits
- Maintains complete accuracy of client data in Salesforce
- Manages various projects simultaneously
- Keeps an open line of communication with all project stakeholders
- Evaluates feedback from stakeholders and implements a plan for areas of improvement and optimization
- Works in conjunction with the Business Process Leader in rolling out new centralized services
- Must be able to interact and communicate at ease with all levels within the organization via phone, email, and/or in-person
- Assists in the training and development of other specialists
- Takes an extremely detail-oriented approach to projects and tasks
- Ability to comprehend, analyze and interpret documents
- Effective problem solving with minimal oversight

- Other duties may be assigned.

EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- 3+ years' experience in professional services, preferably in investment services
- Salesforce experience a plus
- Willing to build expertise in areas with little to no knowledge required
- Strong organizational and time management skills to prioritize heavy individual workload to meet time sensitive deadlines.

Salary Range: \$70,000 - \$80,000