



Title: Cashiering Associate

Location: Overland Park, Kansas

JOB SUMMARY

The **Cashiering Associate** works under the Cashiering Manager and the Director of Operations. The cashiering associate's primary responsibility is to process cash requests upon the direction of the Wealth Manager or Financial Planner.

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

JOB DUTIES

- Schedule and/or work with custodians to process all move money transactions accurately that involve standing instructions or first party permissions. This includes ACH, wire, check and journal (cash & share) transactions.
- Assist in researching and resolving any move money questions or issues
- Follow operational and compliance procedures to log and deposit checks received
- Consistently meet or exceed deadlines
- Exemplify Creative Planning's culture and values
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Ability to prioritize and juggle multiple tasks with competing priorities
- Strong communication skills, both written and oral
- Ability to work independently and within a team environment with minimal supervision
- Ability to remain calm under pressure and make good business decisions considering impact to client and firm

PREFERRED EXPERIENCE / QUALIFICATIONS

- Prior experience in financial services field

TECHNICAL SKILLS

- MS Office
- Windows