



Title: Retirement Plan Outbound 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 **Retirement Plan Outbound Representative** will support the growth of Creative Planning Retirement Services by initiating outbound contact with prospective retirement plan clients and key business decision makers. This role will introduce the firm's retirement plan capabilities, identify potential needs, qualify opportunities, and coordinate next steps with internal retirement plan professionals. The ideal candidate is a confident communicator who is organized, persistent, professional, and comfortable working toward activity and opportunity-development goals.

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

**JOB DUTIES**

- Complete approximately 100–125 outbound calls per day, supplemented by email outreach, to prospective retirement plan clients and eligible Plan Sponsors.
- Introduce Creative Planning Retirement Services and communicate the value of its fiduciary consulting, investment advice, compliance support, and employee financial education capabilities.
- Engage business owners, executives, human resources leaders, finance leaders, and retirement plan administrators to identify needs and assess potential fit.
- Qualify prospective opportunities by confirming Plan Sponsor eligibility and gathering relevant information about the organization, its retirement plan, current priorities, and decision-making process.
- Schedule qualified introductory meetings, with an expected benchmark of one meeting for every 25 live conversations.
- Maintain accurate and timely records of outreach activity, contact information, notes, follow-up commitments, and opportunity status in the designated customer relationship management (CRM) system.
- Coordinate the assignment of qualified opportunities to the appropriate Creative Planning Managing Director or Advisor based on client fit and internal coverage considerations.
- Develop a working knowledge of the retirement plan marketplace and Creative Planning Retirement Services offerings to conduct credible, informed, and compliant conversations.

- Work onsite in Kansas City, with a minimum of three days per week in the Creative Planning office.

## **EXPERIENCE / QUALIFICATIONS**

- Bachelor's degree (B.A. or B.S.) from an accredited university preferred.
- Previous experience in outbound calling, business development, lead generation, inside sales, financial services, or retirement plan services preferred.
- Strong verbal and written communication skills, with the ability to quickly establish rapport and communicate effectively with senior business decision-makers.
- Comfortable initiating conversations, handling objections professionally, and maintaining persistence through multiple follow-up attempts.
- Highly organized and detail-oriented, with the ability to manage a high volume of outreach, follow-up activity, and prospect information.
- Proficiency with Microsoft Office applications and experience using a customer relationship management (CRM) system preferred.
- Ability to learn and effectively communicate retirement plan concepts, industry terminology, service offerings, and applicable communication requirements.