



# CREATIVE PLANNING

Title: Financial Planner

Location: Various States

Job Description: **JOB SUMMARY**

The **Financial Planner** is responsible for the last five of six steps in the CFP Board's Financial Planning Process. This individual interacts with clients on a daily basis to gather information, analyze information, develop recommendations, implement recommendations and monitor the financial plans of their clients. The Planner collaborates with one or more Wealth Managers in the firm to deliver expert, comprehensive financial advice to their clients.

## **JOB DUTIES**

- Participates and conducts client meetings
- Prepares the Financial Planning recommendations
- Collaborates with members from each business line to best serve the client
- Manages accuracy of internal Client Relationship Management (CRM) software
- Implements Financial Planning recommendations
- Monitors the Financial Plan and communicates with clients
- Updates Financial Planning recommendations
- Grey/overlapping tasks between department areas
- All other duties as assigned

## **REQUIRED EXPERIENCE / QUALIFICATIONS**

- CFP® Certificant
- Relevant Educational Background (Finance, Accounting or Business Administration)
- 3 years financial services industry experience
- Pass internal exams - Profiles/Dashboards
- Series 65 (or equivalent) attained within 120 days

## **PREFERRED EXPERIENCE / QUALIFICATIONS**

- Previous financial planning experience

#### **TECHNICAL SKILLS**

- Microsoft Office proficiency
- Keen attention to detail