CREATIVE PLANNING

Title: Client Service Specialist

Location: Leawood, KS

Job Description: **JOB SUMMARY**

The **Client Service Specialist** assists wealth managers and financial planners in preparing and processing paperwork to open and maintain client accounts. They resolve any account related issues that occur. The Manager also processes distributions and contributions to client accounts by either check or electronic means. They are the contact person for all custodians working with Creative Planning.

JOB DUTIES

- Prepares, processes and tracks paperwork for new and existing clients
- Sends distributions to clients via ACH/wire/check
- Communicates with both clients and internal staff to resolve account-related issues
- Prepares, sends and manages online access information for clients
- Resolves case files
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's degree
- No experience necessary

PREFERRED EXPERIENCE / QUALIFICATIONS

- Prior experience in financial services field

TECHNICAL SKILLS

- MS Office 2013/Windows 8 experience preferred