



Title: Institutional Advisor

Location: Various States

Job Description: **JOB SUMMARY**

Creative Planning is a nationally recognized asset management firm that serves institutions, corporate retirement plans and individuals. The Institutional Services department works exclusively with nonprofit organizations (primarily foundations and endowments).

The **Institutional Advisor** works directly with clients to develop and implement strategies to address their financial and investment needs. They are responsible for business development and client retention. The Institutional Advisor is the point person for all client relationships and must have the ability to present the services offered by Creative Planning in a clear and concise manner.

JOB DUTIES

- Serves as the primary point of contact for institutional clients
- Assist in the creation, delivery, execution and management of investment plans
- Develop new business
- Maintains a positive attitude and willingness to adapt in a rapidly changing environment
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Solid knowledge and ability to present complex financial topics to Board/committee members
- Ability to handle highly detailed work with a great degree of accuracy
- Bachelor's degree, preferably in a related field such as finance, business or marketing
- Series 65 (or equivalent substitute) attained within 120 days of hire
- 7 Years financial services experience including direct sales with investment clients

PREFERRED EXPERIENCE / QUALIFICATIONS

- Financial services experience
- Institutional/nonprofit experience
- MBA, or CFA (or CFA candidate)

TECHNICAL SKILLS

- Understanding and previous use of Windows 7 or 8
- Proficiency in MS Word, Excel and PowerPoint
- Orion experience preferred
- Statistical knowledge, ability to run regressions