



Title: Senior Wealth Advisor
Department: CreativeOne Wealth/KCFA
Reports to: Executive Vice President
Location: Overland Park, KS
Status: Full-Time, Exempt

Firm Overview

CreativeOne Wealth is a rapidly growing and highly regarded registered investment advisory firm located in Overland Park, Kansas.

Position Summary

We are seeking a qualified candidate to join the CreativeOne Wealth team. This individual will be responsible for assuming the relationship management of our direct client relationships and provide Wealth Management related services. The Senior Wealth Advisor will be primarily responsible for working with the Company's existing and new client relationships. The Senior Wealth Advisor will manage client relationships, help determine the client's financial goals and plans, and provide advice and recommendations on products and services that best fit the client's needs.

Duties and Responsibilities include, but are not limited to:

- Build strong relationships with existing clients.
- Define client personal goals and financial objectives.
- Analyze clients' financial position (e.g., income/expenses, assets/liabilities, investments, insurance, cash flow)
- Develop financial plans according to client needs.
- Explain investment and insurance offerings.
- Help clients implement their plans.
- Assist in growing the client base.

Preferred Skills & Qualifications

- Proven experience working with clients as a financial planner or similar role.
- Ability to analyze financial information and comply with regulations.
- Investment, Insurance and Retirement Planning knowledge
- Strong ethics, with a customer service-oriented attitude
- Analytical and Problem-Solving Skills.
- Team player
- Outstanding communication skills, with the ability to foster long-term relationships.
- Certified Financial Planner (CFP) Designation and clean U-4
- Insurance License
- Proficiency in MS Office, CRM systems and Financial Planning software.

This description covers the major purpose and major functions of the job. It is not intended to give all details or a step-by-step account of the way each task is to be performed. Employees may receive other job-related instructions and be required to perform other job-related duties requested by their supervisor. All requirements are subject to possible modification to provide reasonable accommodation to qualified individuals with disabilities.

CreativeOne Wealth/KCFA provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.