



**Position Title:** Advisory Billing Specialist

**Department:** CreativeOne Wealth

**Reports To:** Advisory Billing Manager

**Location:** Overland Park, Kansas (Onsite, in office)

**Status:** Full Time/Non-Exempt

#### **Elevate Your Career at CreativeOne!**

Looking for a dynamic and rewarding career in financial services? Join us at CreativeOne, where we blend collaboration, innovation, and excellence to forge a path in the financial services industry. We pride ourselves on being a nationally recognized leader, devoted to empowering independent financial advisors with superior services.

#### **We're Building a Better Financial Future, Together**

We take immense pride in our work and are in search of like-minded individuals who are eager to make a significant impact. If you are ready to be a part of a team that's shaping the future of financial services, we would love to hear from you.

#### **Firm Overview**

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

#### **Position Summary**

The **Advisory Billing Specialist** is responsible for processing billing for advisory services provided to clients. This position will ensure timely and accurate processing of monthly and quarterly billing cycles and assist with other billing functions. This position will report to the Advisory Billing Manager.

The ideal candidate will have a strong understanding of financial transactions, excellent analytical skills, and the ability to communicate effectively with advisors and internal team members.

#### **Duties and Responsibilities include, but are not limited to:**

- Ability to meet strict deadlines in fast-paced environment.
- Responsible for specific billing runs; including custodian uploads, fee billing analysis, adjustment billing, etc.
- Provide communication and support to advisors.
- Troubleshoot issues resulting from advisor inquiries on client billing.
- Daily interaction with advisors, vendors, and teammates to provide excellent customer service.
- Assist and/or resolve account issues/problems with custodial firms.
- Special projects as needed.

#### **Critical Skills Sought**

- Positive attitude.
- Adaptability to frequent change.
- Willingness to learn, contribute to organizational growth.
- Highly organized and communicative.
- Prioritizes work and adheres to established turnaround times and deadlines.
- Applies critical thinking, problem solving skills, and evaluates the level of sensitivity, risk and confidentiality of the work being performed in order to see it through to a resolution.
- Displays patience and empathy both verbally and in writing when communicating with advisors.
- Effectively communicates with cross functional team members within the department and across the organization both verbally and in writing.



- Must be team-oriented, enjoy working with people, and be proactive, flexible, and have the ability to work independently and accurately in a fast-paced environment.
- Excel skills (e.g., formulas, pivot tables, data analysis) required.
- Working experience with Microsoft Access preferred.

#### **Our Core Values**

- *Provide Unreasonably Excellent Service*
- *Love What We Do*
- *Act with Integrity*
- *Collaborate Courageously*
- *Evolve with Purpose*

#### **Preferred Qualifications/Experience**

- 4+ years in investment operations experience with at least 2 years of experience in advisory billing.
- Experience with Charles Schwab, Fidelity, and Pershing institutional platforms.
- Bachelor's degree preferred.
- Series 65 and/or Series 7 preferred.
- Must be able to pass a background check as well as a credit check.
- Experience with Microsoft Excel required
- Experience with Microsoft Access preferred.

#### **About CreativeOne**

CreativeOne is an industry-leading marketing and consulting firm that helps independent financial advisors grow their businesses. We combine deep financial expertise with full-service creative and media capabilities, delivering tailored marketing that drives measurable growth. With over 40 years of innovation behind us, we're building the next generation of advisor marketing—and we're looking for top talent to help lead the way.

#### **About CreativeOne Wealth**

CreativeOne Wealth is an SEC-Registered Investment Advisory firm that delivers an advisor-centric experience, empowering financial firms across the U.S. CreativeOne Wealth's vertically integrated wealth management services coupled with industry-leading marketing helps entrepreneurial wealth managers navigate increasingly dynamic and complex needs.

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*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 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.*

*Our company does not currently sponsor employment visas. Applicants must be authorized to work for any employer in the U.S.*

