



**Title:** Wealth Advisor

**Department:** CreativeOne Wealth/CreativeOne Advisors Group

**Reports to:** Executive Vice President

**Location:** Overland Park, KS

**Status:** Full-Time, 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**

We are seeking a qualified **Wealth Advisor** to join the CreativeOne Wealth team. This individual will be responsible for assuming the relationship management of our direct client relationships and providing Wealth Management-related services. The **Wealth Advisor** will be primarily responsible for working with the Company's existing and new client relationships. The **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.
- Some travel required.

### **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.

#### **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.*