



CREATIVE PLANNING

Title: Experience Manager

Location: Cincinnati, OH

Job

Description:

JOB SUMMARY

The primary goal of the **Experience Manager** is to be the face of Creative, welcoming clients and making an amazing first impression. The Experience Manager establishes and maintains a professional relationship with clients and is often the first point of contact for Creative Planning. The Experience Manager performs a wide range of support activities to facilitate the efficient operation of Creative Planning's National offices and, as part of the administrative team, completes firm-wide projects and activities as requested.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Greets current and new clients, offers drinks and alerts appropriate staff member(s) promptly
- Answers phones and directs calls; addresses questions using in-depth knowledge of company services
- Ensures knowledge of staff movements in and out of the building
- Schedules and confirms many types of appointments
- Sorts and distributes daily mail and deliveries including large quantities of checks
- Prepares outgoing UPS shipments and orders shipping supplies
- Schedules conference room spaces
- Assists with building maintenance coordination
- Makes coffee and stocks refrigerator with drinks for clients
- Keeps kitchen clean and organized
- Maintains ordering and delivery system for supplies
- Orders coffee, reception and break room supplies; maintains inventory and delivery system
- Assists in coordination of office social events and catering (e.g., holiday party, happy hour, client lunches, volunteer events, etc.)

- Creates and sends marketing deliverables (client binders, marketing folders, prospect kits)
- Scans and stores documents for client start meetings (or as requested)
- Enters new clients and qualified prospects into CRM database
- Provides notary public services for building staff
- Coordinates national seminars for individual wealth managers; assists with firm-wide special event planning
- Orders referral and condolence gifts
- Provides assistance with administrative support tasks as requested
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Energetic, high-level multi-tasker
- Excellent communication skills
- Efficient, extremely detail oriented and accurate
- Able to lift boxes up to 35 lbs.

PREFERRED EXPERIENCE / QUALIFICATIONS

- 2 – 3 years reception/admin support experience
- Knowledge of standard office equipment operation
- Prior experience in financial services field preferred

TECHNICAL SKILLS

- MS Office (mastery of Word, Outlook required; Excel experience a plus)
- Database management
- Multi-line phone system