CREATIVE PLANNING
RETIREMENT SERVICES

Title: Key Account Manager 401(k)

Location: New York/New Jersey

Job Description: **JOB SUMMARY**

The **Key Account Manager** is responsible for ensuring overall client satisfaction and retention of partners, intermediaries and clients through qualitative servicing and value-added consulting. The Account Manager builds and strengthens these relationships by independently providing day-to-day exceptional customer service to ensure client expectations are met and/or exceeded.

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

JOB DUTIES

- Serves as the primary point of contact for retirement plan clients
- Establishes and maintains strong working relationships with dedicated clients and partners
- Provides clear and concise communication regarding overall service expectations as well as procedures and time frames to clients and partners related to complex questions that require further research and analysis
- Uses expertise to assist in the creation, delivery, execution and management of complex financial plans
- Responsible for increasing market share in their local market
- Provides one-on-one individual counseling to current plan participants and non-participants
- Proactively increases plan participation and participant savings rates within assigned accounts
- Organizes and conducts a broad series of group educational seminars designed to enhance participant knowledge and understanding of investment and savings basic principles
- Effectively implements targeted savings and educational initiatives in conjunction with or as requested by plan sponsors
- Regularly communicates with team members regarding client issues, service efforts, new initiatives and other opportunities to expand the existing client base
- Maintains a positive attitude and willingness to adapt in a rapidly changing environment
- All other duties and projects as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Series 63 and 65, or Series 66
- 7 years customer service experience within the retirement services industry
- Solid knowledge and ability to present complex investment topics to clients
- Comprehensive knowledge of retirement plans, ERISA, DOL and IRS regulations and plan documents (individually designed and prototype)

- Computer literacy with record keeping systems and trust systems; experience with plan record keeping and trust reconciliations
- 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
- Ability to work in a team environment to ensure common goal of providing exceptional customer service
- Ability to travel as needed

TECHNICAL SKILLS

- Understanding and previous use of Windows
- Proficiency in MS Word, Excel and PowerPoint
- Understanding of mobile operating systems such as Android or IOS
- Ability to adapt and integrate new technology quickly

Salary range: $80,000 - $100,000