

BUILDING PUBLIC SECTOR
RETIREMENT SECURITY



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for the public sector. [Learn more](#) about
ICMA-RC.

Requisition Number	SLS070813
Post Date	11/7/2016
Title	Certified Financial Planner
City	Kansas City
State	MO
Description	Reach Your Peak with ICMA-RC, a FINANCIAL SERVICES LEADER in public sector employee retirement products and services. Headquartered in Washington, DC, our Financial Services corporation manages over \$50 billion in retirement plan assets for more than one million participant accounts. We are constantly looking for ways to create new opportunities to serve our participants. We have an extraordinary talent base and invite you to consider joining ICMA-RC's Sales team in the Kansas City, Missouri area.

This position is responsible for conducting pre-retirement planning seminars for ICMA-RC clients and employees and individual financial planning sessions for the high-balance investors. The Goal is to establish ICMA-RC as the sole necessary resource for financial planning guidance both in advance of and throughout actual retirement. The seminars will be both a broad educational outreach effort and a mechanism to identify and acquire new business.

Significant travel is required.

Essential functions for this role include:

- Using highly effective presentation and personal communication skills, conduct retirement planning seminars and one-on-one financial counseling sessions to the employees of ICMA-RC's clients throughout the assigned geographic area.
- Using knowledge of clients and information gleaned during presentations, achieve sales goals based on revenue producing assets and retention of high balanced participants in the assigned territory.

- Responsible for staying current on all ICMA-RC products and services as well as initiatives in the industry at large.
- Must be able to drive to majority of meeting locations.
- May be required to present to 2nd and 3rd shifts both before and after normal business hours.

Note: Significant travel is required (up to 60%)

Requirements

If you have the following credentials, we encourage you to apply:

- BA/BS Degree or equivalent work-related experience
- 5-7 years of Financial Services experience with extensive client interaction. Some sales experience also required
- Demonstrated sales and negotiation skills
- Effective presentation skills to large groups and excellent interpersonal and communication skills
- Demonstrated ability to build and maintain effective relationships
- Thorough knowledge of 457, 401, IRA and annuity products
- FINRA Series 6, 63 licenses (CFP replaces 65) and CFP is required
- Life Insurance license required

For your well-being, we offer a solid compensation and benefits package that features a competitive salary, a straight-forward incentive plan that rewards results, and a 401(k) Plan. For your career, we offer tuition reimbursement, professional development courses, seminars, career enrichment assignments, mentoring programs and a record of enterprise growth that creates continuing opportunities for career advancement. Consider ICMA-RC, and respond in strictest confidence. ICMA-RC is an Equal Opportunity Employer that values diversity in the workplace. Minorities and women are encouraged to apply. We look forward to hearing from you.

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