

## [Personal Financial Planner- Country Club Bank, 1 Ward Parkway, Kansas City, MO 64112](#)

**Job Function:** The **Personal Financial Planner** is a key member of the Country Club Trust Company (“CCTC”) and Tower Wealth Managers (“TWM”) team. The primary role will be to develop and personally deliver all or part of the personal financial planning process to appropriate clients and prospects of CCTC and TWM, along with the broader Country Club Bank organization as appropriate. Successful candidates would have at least five years of experience working directly with clients, analyzing their needs, making recommendations, and maintaining effective relationships to best help them achieve their financial goals.

Join our experienced team of trust and investment professionals. We are looking for talented professionals who wants to serve the client’s best interests.

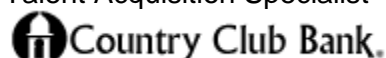
### **Essential Duties and Responsibilities:**

- Establish and define the relationship with the client (whether it encompasses a comprehensive financial plan or a particular component)
- Analyze and evaluate client’s financial status
- Gather client data and establish client goals
- Develop and present (either directly or through internal business partners) financial planning recommendations and alternatives, demonstrating a broad base of knowledge across all areas of financial planning including investments, insurance, income tax management, retirement analysis and estate planning
- Assist in the implementation of financial planning recommendations
- Monitor financial planning recommendations
- Assist in the establishment of new client relationships and enhancement of existing client relationships
- Assist other officers of CCTC/TWM/CCFSI in delivery of financial planning to support their efforts in developing and/or maintaining key client relationships
- Work effectively as a business partner with all areas of the organization
- Special projects as needed or assigned, including, but not limited to associate and/or client training and/or seminars
- Attends work regularly and consistently to ensure appropriate staffing needs are met in the department and the organization, and needs are met in a timely fashion
- Other tasks as assigned from time to time by supervisor or other member of management

### **Job Qualifications/ Required Skills and Abilities:**

- Certified Financial Planner (CFP) designation required
- Bachelor’s degree in related field or equivalent work experience

Janet Rickard, MM  
Talent Acquisition Specialist



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