Be part of something more.

A majority of our time is spent “at work.” We believe that time is most meaningful when it’s spent around people who care about you and who challenge you. We hire people who know how to make good decisions, because we won’t be constantly looking over your shoulder—you’ll be empowered to do what’s right for our customers. Most importantly, we’re a partner. We partner with our associates to help them thrive personally and professionally. We partner with our communities and the organizations that support them. And, we partner with our customers to create an experience they won’t find elsewhere.

Duties & Responsibilities

Type of Role: Individual contributor, experienced

Area of Responsibility and Purview: Deliver financial planning services to Private Wealth Management clients

Role Specific Job Duties:

- Primarily focused on servicing emerging and mass affluent client segments, as a member of a centralized financial planning team

Function Specific Job Duties:

- Responsible for providing financial planning and support for emerging and mass affluent client segments
- Partner with Wealth Advisors in the creation and updating of client financial plans, utilizing firm approved planning software
- Provide ongoing, virtual financial planning support to clients enrolled in the firm’s Digital Advice Solution
- Assist Wealth Advisors and other associates with planning related questions
- Effectively manage the workflow of all financial plans in a timely manner
- Through a consistent and scalable planning process, develop high quality financial plans tailored to client-specific financial goals
- Stay current on all tax rules, laws and regulations that could financially impact UMB clients
- Review activities within the job scope for sufficient controls to prevent errors, breaches of client confidentiality, and misstatements of financial results
- Works collaboratively with Senior Wealth Planners and others on the team to solve for complex client situations and advice topics
- Ensure clients have a positive service experience that always exceeds their expectations
- Build and maintain client relationships aimed at client retention and engagement
- Assist in the new client prospect and onboarding process, inclusive of assisting client setup in eMoney as necessary
- Maintain and update Salesforce CRM for all financial planning activities

- Manage client paperwork and electronic data files for all financial planning relationships
- Understand the client's overall business needs and help identify value-added services that Private Wealth can provide
- Effectively manage the workflow of all financial plans in a timely manner
- Other duties as assigned

Requirements

MINIMUM:
- Bachelor's degree in relevant field or combination of education and experience that provides and equivalent background
- 3+ years of applicable experience within Financial Services
- CFP or in pursuit of

PREFERRED:
- CFP or advanced designation
- FINRA Series 65 licensed

Knowledge & Skills

MINIMUM:
Job Skills:
- Great communicator with strong interpersonal skills
- Systems thinking and complex problem solving
- Attention to detail, yet ability to grasp big picture
- Highly organized and can effectively multi-task
- Understanding of financial planning best practices
- Ability to work independently, collaborating with others to accomplish client objectives
- Ability to adapt to changing information and business needs
- Demonstrated ability to learn and communicate complex and detailed information
- Analytical problem solver with the ability to think creatively
- Organize and prioritize activities to ensure completion within established deadlines
- Exceptional written communication
- Demonstrated strong math skills
- Effective financial research skills

Technical Skills:
- Strong proficiency of Microsoft Office Suite (Word, Excel, PowerPoint, SharePoint)
- Familiarity with eMoney client portal and financial planning software, or similar software

PREFERRED:
Job Skills:
- Working knowledge of complex account types
- Demonstrated experience with a wide range of client situations and inquiries
- Experience in supporting financial planning data collection, entry, and process

- General knowledge of compliance rules and regulations within wealth management

Technical Skills:

- Proficiency in Salesforce CRM software
- Proficiency in UMB custody and clearing platforms such as SEI and Fidelity Wealthscape
- Proficiency with eMoney client portal and financial planning software
- Proficiency in Workday, Peoplesoft, Archer, Skillport and Hyperion
- Smart, intellectual, and business savvy
- Driven to succeed; passionate
- Trustworthy
- Consistent high performer
- Adaptable and able to adjust to many different personalities
- Surrounded always by other high performers
- Very hard worker
- Resourceful; overcome obstacles
- Effective leader, even without authority
- Down-to-earth, well-grounded, self-aware, humble

Work Environment

- Type: Office Centric (60% In Office)
- Location: 1010 Grand, Kansas City, MO

If interested, please click HERE to apply

UMB and its affiliates are committed to inclusion and diversity and provide employment opportunities to all employees and applicants for employment without regard to race, color, religion, sex (including gender, pregnancy, sexual orientation, and gender identity), national origin, age, disability, military service, veteran status, genetic information, or any other status protected by applicable federal, state, or local law. If you need accommodation for any part of the employment process because of a disability, please send an e-mail to talentacquisition@umb.com or call 816-860-7972 to let us know the nature of your request.