

Key Bank

Director of Key Private Client Planning

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locations

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time type

Full time

posted on

Posted 14 Days Ago

job requisition id

R-10005

Location:

100 Public Square - Cleveland, Ohio 44113

JOB BRIEF (PURPOSE)

This position is responsible for administration and management of financial planning within the mass affluent segment. This position also serves as liaison to other parts of the Key Wealth Management including but not limited to In Field Advisors, KPB Planning Leadership and other Key Wealth Leaders. Maintaining appropriate risk controls, assistance in testing, controlling and training on available financial planning software across the Wealth Segment and the support of advice based sales process through assistance in identifying and delivering appropriate advice is also part of this position

ESSENTIAL JOB FUNCTIONS

- Partner with the Director of Digital Client Experience & Planning on design and implementation of the digital mass affluent planning experience and ongoing execution
- Attend the digital squad design, discovery and sprint meetings as appropriate
- Conduct and coordinate any testing needed for each release to clients or preliminary pilots
- Partner with the field on new enhancements or defect management
- Be the spokesperson at New Hire orientation, and other training events
- Partner with the Investment Center on triaging client questions generated from the online digital planning portal
- Ensure each client planning question submitted via digital planning is responded to in a timely manner
- Track the trends of client questions to help create better training, assistance and improvement of the overall digital planning experience
- Train the Investment Center and OLB Contact Center on common Q&A
- Partner with the Director of KPB Planning if the volume of client questions becomes unwieldy
- Own the coordination of content on the Wealth Institute for the mass affluent space
- Identify timely advice topics for the mass affluent audience and either write or coordinate the content creation
- Partner with the Field Advisors to identify trends and important topics they are dealing with
- Handle central planning overflow when needed (small part of role)
- As central planning volume spikes or if turnover occurs within the central planning team be prepared to assist with the overflow as coordinated by the Director of KPB Planning
- Attend leadership meeting with KPC as needed, partner with the KPC regional leaders

- Ensure KPC leadership and the regional managers are up to date on the digital planning experience
- Represent Planning in KPC leadership internal or offsite meetings
- Represent Financial Planning and Advice for the Mass Affluent Wealth Segment
- Develop and/or coordinate appropriate training materials, web site materials and vendor programs for promoting the financial planning process
- Be the spokesperson at New Hire orientation, and other training events
- Develop programs that help advisors and others become users of the financial planning services
- Assist in training on software, cross selling, systems, etc.: where appropriate
- Attend Industry relevant conferences
- Measure, Assess, and Propose solutions based on digital and in person planning metrics
- Tracks plans created by the FAs and Clients and prepares summary reports for senior management
- Analyzes usage trends and projects future usage
- Identifies opportunities for enhancing usage, proposes solutions and implements approved strategies for enhancing ability of organization to deliver advice to clients through planning
- Maintains awareness and communicates planning trends, competition, emerging market place issues and regulatory environment.
- Interface with other Community Bank product and sales team members as necessary to provide exemplary service to the client. As a team player, promote a professional atmosphere that encourages the open expression of ideas and opinions leading to a successful sales environment.

MARGINAL OR PERIPHERAL FUNCTIONS

- Support and execute national sales and advice initiatives
- Participate in Key's commitment to the community.
- Projects as assigned by the Leadership
- Meets with clients where deemed necessary
- Travel as needed based on training schedules, conferences and leadership meetings

REQUIRED QUALIFICATIONS

- CFP or advanced planning designation required
- Series 65 or 7 preferred
- A minimum of ten years of applicable Planning experience or equivalent.
- Undergraduate degree or equivalent experience.

- Sales experience
- Excellent interpersonal and communication skills
- Strong customer focus
- Ability to work as a team member
- Working knowledge of investment/securities

PREFERRED QUALIFICATIONS

- Expertise in Client Experience
- Project management experience
- Management Experience

COMPETENCIES/SKILLS

- Leadership, management, and coaching
- Services/Sales: Client service, product knowledge, relationship management, sales closing, cross selling, needs identification.
- Problem Solving/Decision Making: Analyzes issues, follows through, risk management.
- Communications: Listens to others, speaks effectively, written communications.
- Interpersonal: Answers questions, builds relationships, networking
- Personal Effectiveness: Community involvement, detail orientation, develops oneself, drives for results, personal organization.

EQUIPMENT USED

- Money Guide Pro, Anny Tool, Brokerage Portal, Salesforce, Discovery and Proposal Tools, Financial Planning Research Sites

TRAINING REQUIRED

- On the job and as required to maintain licenses and certifications.

Key has implemented a role-based Mobile by Design approach to our employee workspaces, dedicating space to those whose roles require specific workspaces, while providing flexible options for roles which are less dependent on assigned workspaces and can be performed effectively in a mobile environment. As a result, this role may be mobile or home based, which means you may work either at a home office or in a Key facility to perform your job duties.

KeyCorp is an Equal Opportunity and Affirmative Action Employer committed to building a diverse, equitable and inclusive culture. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, veteran status or other protected category.

Qualified individuals with disabilities or disabled veterans who are unable or limited in their ability to apply on this site may request reasonable accommodations by emailing HR.Compliance@keybank.com.