401(K) Education Services Consultant – located in OKC (covering a regional territory)

BOK Financial (BOKF), Headquartered in Tulsa, Oklahoma, BOK Financial Corporation (NASDAQ: BOKF) is a top 25 U.S.-based financial services holding company with operations in ten states – Oklahoma, Texas, Arkansas, Arizona, Colorado, Kansas/Missouri, New Mexico, Nebraska and Wisconsin. The company began more than 100 years ago in Tulsa and has successfully diversified into a variety of industries, businesses and geographies.

Summary

We're building a culture at BOK Financial where amazing people (like you) can bring their best, be their best and work for the best. You've come to the right place to grow your career.

About the Role

As the Institutional Wealth 401K Education Consultant II you will be responsible for educating retirement plan participants through consultative training and presentations. This position is an excellent fit for an Investment Education Consultant, Financial Advisor or training professional.

You will have a regional territory (OKC, KC and KS) and will travel throughout the region 60 – 70% of the time.

What You Can Expect

In this role you will create and enhance employee education programs to include increasing participant enrollment and participant savings rates, improving diversification of participant investments, pre-retirement planning, post retirement planning, financial planning, participant advice products, and retirement projections.

You will make presentations to retirement plan participants in person, via webinar, or a combination of both. You will also work closely with internal partners (Client Advisors and Relationship Managers) to coordinate and manage the relationships.

Team Culture

We are a collaborative, conscientious, and goal-oriented team. We value initiative, and we care about the quality of our work. Managers across the line of business are readily available and accessible for any needs you may have. You are responsible for driving the process, and our leaders are there to support you. Mentorship within the team is a common practice that will provide opportunities for growth.

How You'll Spend Your Time

- You will conduct live, interactive, multimedia education and training seminars, workshops, and one-on-one meetings with BOKF Plan Sponsors, Relationship Managers, Education Consultants, and Plan Compliance.

- You will research and develop a comprehensive understanding of the individual client's plan provisions and investment options in preparation for conducting the seminar.

- You will create and update existing education campaigns, PowerPoint presentations, videos, and other communication pieces.

- You will provide summaries and analysis of the meetings held by the team. You will keep track of meetings held and provide quantifiable metrics of the effectiveness of the meetings. You will provide periodic reports to leadership and internal partners.

We'd Like to Talk to You

COMMUNICATION: You will need exceptional verbal and written communication to express yourself clearly and concisely to internal and external clients.

PRESENTATION SKILLS: You will need superior group presentation skills, including ability to handle group dynamics and question and answer sessions

RESULTS ORIENTED: You show initiative as you focus on the desired deliverables, while meeting and exceeding your goals.

SUBJECT MATTER EXPERT: Solid understanding of investments, financial and retirement planning, and employee benefits products will be beneficial in making recommendations to our clients. Financial services knowledge is a plus, but not required.

TECHNICAL EXPERTISE: You'll need advanced proficiency MS Office, particularly in PowerPoint. Experience with Articulate Software highly desirable.

ORGANIZATION: You will need to be efficient to handle multiple requests, and prioritize your work.

Education & Experience Requirements

This level of knowledge is normally acquired through completion of a Bachelor's Degree in Business or a related field and 5-7 years of experience in communications, investments or marketing or 9-10 years of equivalent work experience.

PREFERRED: Professional Trainer Certification, Chartered Mutual Fund Consultant, Licensed Financial Consultant

BOK Financial is a stable and financially strong organization that provides excellent training and development to support building the long term careers of our employees. **With passion, skill and partnership you can make an impact on the success of the bank, our customers and your own career!**

BOK Financial is an equal opportunity employer. We are committed to providing equal employment opportunities for training, compensation, transfer, promotion and other aspects of employment for all qualified applicants and employees without regard to sex, race, color, religion, national origin, age, disability, sexual orientation, genetic information or veteran status.

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