AmeriTrust Corporation and AmeriTrust Investment Advisors, Inc. (AIA) provide comprehensive wealth management services with an emphasis on personal attention and superior client service. AmeriTrust Investment Advisors, Inc. (AIA), a Registered Investment Advisor firm, is an affiliated company with AmeriTrust Corporation. On July 1, 2018, we merged our companies with Argent Financial Group, Inc. to further expand our services to help clients preserve and grow their wealth. Argent is a leading fiduciary wealth management firm in 30 markets located across 12 southern states, Argent employs over 300 professionals with responsibility for more than $30 billion in client assets and 3 million mineral acres. We continue to be a company that is privately owned by our staff, clients, and avid supporters, all committed to serving our clients excellently, just as we began. Argent subsidiary Argent Trust Company of Oklahoma now holds the charter for AmeriTrust, but our name, leadership, location, and investment philosophy all remain consistent to continue to serve our clients in the manner they have come to expect.

**Job Title – Financial Planning Analyst**

**Role Responsibilities**

Headquartered in Tulsa, OK, AmeriTrust Investment Advisors, Inc. is looking for a Financial Planning Analyst. Looking for a driven and self-motivated individual who is committed to helping clients reach their financial goals through comprehensive personal financial planning. This position will work in the Tulsa office in a team setting and will be responsible for helping clients with the implementation of their financial plans, continuous monitoring, and timely updates. This is a full-time position with set hours of 8am to 5pm with occasional overtime, as needed. This is a non-exempt position reporting to the Assistant Vice President/Financial Planning.

* Gather and organize client provided financial information, track client financial plan action items and needs, schedule update client conferences.
* Assist with input of client provided data into financial planning software system and maintain updates as required. Become proficient with all financial planning support schedules and programs.
* Meet with prospects and existing clients to assist with updates and financial planning conferences. Maintain and update all client data.
* Research and prepare memorandums on financial planning issues and client requests.
* Coordinate with Investment department to ensure investment guidelines and special requests have been provided.
* Review asset allocation and update investment portfolios on a quarterly basis for retainer financial planning clients.
* Write follow-up letters and other client communication to keep the “action plan” current.
* Assist with developing prospects and centers of influence and making presentations to individuals and groups toward goal to adding new clients.
* Assist other associates on special projects to assist with investment management clients or prospects.
* Attend professional development seminars/classes to satisfy continuing education requirements for certification.

**Role Requirements**

The person we are looking for should possess the following characteristics and skills:

* Undergraduate/Graduate degree preferred
* Strong verbal and written communication skills
* Excellent attention to detail
* Self-motivated & willing to be proactive
* Excel and Word proficiency preferred.
* Understanding of tax planning concepts and working with financial planning software
* Ability to plan and utilize your time effectively
* Must possess or be able to pass the NASAA Series 65 exam within 90 days of hire.

**Work Environment**

At AmeriTrust, client satisfaction is a big measure of our success. But it’s not the only one. We know that having happy employees makes for am more motivated and – let’s be honest – pleasant workplace. Argent intentionally nurtures our culture and engage each of our 300 employees across 30 offices in 12 Southern States, including AmeriTrust. Although, we’re not all in the same place physically, we want each employee to feel that they’re part of a wider workplace community. We know our company is only as strong as its employees, so we intend to keep up our efforts to maintain a healthy internal culture at Argent in 2021 and beyond.