

**Employer:** Brent Forrest & Associates, LLC

**Website:** <https://www.brentforrest.com/>

**Location:** San Antonio, TX

**Job Role:** Associate Planner

**Employment Type:** Full-Time

**Hours:** Monday – Thursday: 7:30 am – 4:00 pm & Friday: 7:30 am – 3:00 pm

**Salary Range:** \$55,000 - \$65,000 (Salary is commensurate with experience)

**Requirements and Qualifications:**

1. Bachelor's degree in finance, accounting, or related field, or equivalent experience (4 Years)
2. Active Series 65 License or obtainment within six (6) months of employment date
3. Certified Financial Planner™ designation desired or obtained within two (2) years of employment date
4. Superior client service skills with a genuine interest in serving clients. Ability to maintain patience, good judgment, and confidentiality in all client relations.
5. Excellent verbal, written and interpersonal communication skills.
6. Ability to work independently and effectively in a team environment, in-office and virtually.
7. Highly organized, attentive to detail, and committed to seeing tasks through to completion.
8. Must manage highly confidential information with professionalism and unquestionable integrity.

**Position Responsibilities & Activities:**

1. Assist the Client Advisors with managing client relationships
2. Participate in new client data intake, organization, and analysis
3. Assist in the development and presentation of financial planning deliverables
4. Prepare follow-up communications and post-meeting notes
5. Responsible for all follow-up activities post client meetings
6. Enter client information into Planning Software, analyze, and generate wealth plans.
7. Learn the process of opening maintaining and transferring client accounts
8. Miscellaneous client/office services projects as assigned.
9. Adhere to all company policies and industry rules and regulations.

**Benefits Include:**

- Annual performance-based bonus eligibility.
- 401(k) with matching contribution and profit sharing.
- Free brokerage access through custodial platform.
- Competitive paid time off along with all market holidays.
- Flex-schedule to include remote work once core competencies are exhibited.
- Paid continuing education and access to training and opportunity for professional growth.

Successful candidate will be required to pass a background check.

**If you are interested in applying for this position, please submit your resume to:**  
**Taylor Chamness, [taylor@brentforrest.com](mailto:taylor@brentforrest.com)**

*\*We will respond within 1 business day to your email\**