


Bret O'Guinn

PARAPLANNER

 469-966-1933



Services

Tax Planning and Preparation

Employee Benefits

Retirement Planning

Credentials

FINRA Series 66

FINRA Series 7

Education

University of Central Arkansas, BA-Finance, 2019

Overview

Bret supports financial advisors in building and maintaining trusted client relationships by ensuring all relevant administrative work is handled with care.

With more than five years of experience in the financial planning/wealth management industry, he enjoys helping clients at all stages of life work toward and achieve long-term financial goals.

Bret joined QuadCap in 2024. Prior to this, Bret worked at Goldman Sachs Ayco where he gained invaluable experience in the wealth management field. While there, he built on his expertise in financial planning by working alongside a team supporting multiple financial advisors' books of clients.