FRONTIER
WEALTH MANAGEMENT

FINANCIAL PLANNING ASSOCIATE – JOB DESCRIPTION

Frontier Wealth Management is a registered investment advisory firm that offers a full range of financial planning, investment, tax, insurance and other wealth management solutions to individuals, families and busy professionals. We create customized financial plans tailored to our clients' unique circumstances and goals. Our purpose is to identify and create solutions that will simplify our clients' lives and empower them with confidence.

Financial planning is the foundation of the Frontier philosophy, and we believe that offering the correct investment advice requires a comprehensive financial plan. The Financial Planning Associate position is a professional position that will work closely with both our Senior Financial Planner and other Financial Planning Specialist, but also must be able to work independently to support financial advisors by serving existing and potential clients. In addition, this position will work closely with Frontier's other Specialists to create the customized and comprehensive financial plan.

You are expected to perform various tasks, but the primary focus will be on preparing comprehensive financial plans using MoneyGuide Elite, Cheshire, or Frontier's proprietary planning software (Excel based). Additionally, this position will require periodic client meetings along with the advisor. To succeed at this position, you need to be extremely detailed, structured, process-oriented, analytical, and have a high degree of follow-through and communication skills.

RESPONSIBILITIES/ROLES:

- Prepare comprehensive financial plans for clients, including retirement projections, estate-planning analysis (including reading through, understanding, and discussing trust documents), tax-planning, Social Security claiming analysis, education-funding analysis, stock options analysis, and risk management needs analysis.
- Continuously monitor clients' financial situations with detail and accuracy.
- Use both software based (Money Guide Pro Elite and/or Cheshire) and proprietary financial planning tools to create financial plans for clients.
- Partner with Advisor team to deliver an exceptional, seamless experience with a focus on accuracy, timeliness, and accountability for the client's future.
- Enhance relationships with key clients through needs assessment dialogues. Use exceptional Client Relationship Management skills to uncover clients' advance needs and position the appropriate solution to meet those needs.
- Work closely with our team of Specialists to develop client strategies that incorporate any recommendations that are relevant and specific to each client.
- Keep current on financial planning topics including, but not limited to, wealth transfer strategies, complex retirement needs, Social Security, and tax planning.
- Proactively engage with our smaller client base to assist advisors with increasing current client wallet share.

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QUALIFICATIONS/REQUIREMENTS:
- CFP® designation
- 5+ years of experience in financial planning
- Detail-orientated and analytical with the ability to organize data and think critically "on-the-spot"
- Proficient in Microsoft Excel
- Positive attitude with the ability to be mentored, desire to learn, and effectively manage change
- Excellent communication skills
- Team player, results driven, "get-it-done" attitude
- Ability to proactively contact advisors and clients

Bonus Qualifications/Skills
- Experience with Charles Schwab and/or TD Ameritrade
- Experience with Tamarac and CRM systems

EMPLOYMENT DETAILS:
- Full-time salaried position with opportunities to earn annual bonus
- Medical, vision, dental and life insurance
- Company 401(k) plan offered
- Collaborative office environment

For more information, email mark@frontierwealth.com