Title: **Wealth Advisor**
Location: **Austin**
Scope: **Full-time, exempt**
Structure: **Reports to Senior Wealth Advisor**

The Firm

Founded in 1994, Frontier is a wealth management firm dedicated to building relationships and enriching lives through comprehensive wealth management. Our life-centered approach provides our clients with a roadmap to help them live their best life possible. The Frontier family is a team of highly credentialed professionals who provide our clients customized investment and planning solutions with fiduciary care.

The Role

We are seeking an experienced Wealth Advisor who is a relationship builder at heart, with strong communication skills and a problem-solving mindset that thrives in a fast-paced and evolving organization. Our ideal candidate is self-motivated, adept at managing client relationships, consistently performs at a high level under variable workloads, and has a passion for making a positive impact on client's lives.

Responsibilities

- Maintaining and expanding existing client relationships, leading a first-class onboarding experience for new client relationships
- Developing, delivering, and implementing customized financial plans
- Conducting portfolio and planning reviews
- Preparing investment proposals
- Collaborating with our referral partners
- Supporting the firm's business development efforts
- Adherence to and knowledge of regulatory requirements
- Strong follow-through and follow-up skills to monitor progress

The Person

The candidate should have strong professional communication and interpersonal skills. They possess the ability to motivate themselves to manage a book of clients and deliver an impeccable experience.

The ideal candidate will have experience and attributes in the following areas:

- Strong interpersonal skills and an innate ability to build immediate rapport with personnel and clients
- Strong EQ and ability to connect with clients on a deeper level to discover their true motivations and priorities
- Solid understanding of financial planning concepts; experience in delivering actionable advice and partnering with clients in implementing a financial plan
- A measurable track record of creating strong client relationships – through high retention rate, increased wallet share capture, and receiving referrals

Required Skills/Experience

- Experience in investment management business (minimum of 7 years required)
- CFP® certification or the ability to attain certification within 12 months
- Excellent quantitative, verbal and written communication skills—must be able to provide a concise investment thesis for a range of audiences (from portfolio manager to unsophisticated client)
- Knowledgeable in personal tax, asset management, financial planning, insurance, estate, and retirement planning
- Demonstrate analytical and problem-solving skills
- Multitasker able to handle multiple undertakings at once, ranging from analytical to relational tasks
- Energetic and team-oriented individual to support a growing advisory practice
- Experience with eMoney, Salesforce, and Tamarac a plus
- Securities representative licenses (Series 65 or 66)
- This role will require you to be accepted into the SAN (Schwab Advisor Network)