**About Us**

Since the founding of Frontier in 1994, we have strived to build relationships and enrich lives. Our life-centered approach provides our clients with a roadmap to living their best life possible. Today our firm works with families across the country and manages over $2.6 Billion in assets.

The Frontier Family is a team of highly credentialed professionals who are dedicated to providing our clients investment and planning solutions. We are continuing to add new faces to our team to ensure that we provide the highest level of service.

At Frontier, we offer a competitive salary, 401k match, health benefits, on-site fitness center and free garage parking. If you are wanting to start the next chapter of your life in a role that challenges you, allows you to learn & grow and values your presence, then take the step with Frontier.

**Job Details**

Position: Full-time

Title: Relationship Manager

Salary: $50,000

Description: The goal of the Relationship Manager is to build strong relationships with our clients by focusing on many of the day-to-day tasks that create a superior client experience. This role could be a stepping stone to becoming a future Wealth Advisor or Director. Specific responsibilities include, but are not limited to the following:

* Working with clients & prospects
* Attending client meetings
* Directing telephone calls
* Leading clients through the on-boarding process
* Training clients on software & applications
* Preparing client paperwork (New accounts, Investment Policy Statements, etc.)
* Delivering service solutions to clients
* Preparing letters of instruction for clients
* Composing client correspondences
* Working with various custodians to assist in resolving client account issues
* Supporting the firm’s advisors in building investment proposals
* Reaching out to clients & prospects to schedule meetings
* Gathering & inputting client data
* Preparing account performance reports
* Maintaining supplies of current financial planning marketing materials

Qualifications:

* Bachelor’s degree required
* CFP® designation or working towards one
* Cheerful & outgoing personality
* Excellent oral and written communications skills
* Strong attention to detail with the ability to work with a high degree of accuracy
* Familiarity with Microsoft applications, data entry, Financial software (eMoney, Tamarac, laserfiche, CRM, Schwab Advisor, etc.)
* Experience in administrative support or customer services, preferably in the financial services and/or insurance industry
* Demonstrated organizational and time management skills and ability to multitask, set priorities and meet deadlines
* Ability to work independently in a fast-paced, team-oriented environment
* Ability to maintain confidentiality

If you are interested in joining the team, please send us an email with a cover letter and resume to [Bkeesee@frontierinvest.com](mailto:Bkeesee@frontierinvest.com).