

**Title: Associate Wealth Advisor**

**Location: Austin Area**

**Scope: Full-time, exempt**

**Structure: Reports to Senior Wealth Advisor**

**Salary: 60k + 12k bonus (3k quarterly)**

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**The Firm**

Founded in 1994, Frontier is an industry-leading 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 living 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 Associate 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, a proactive learner, consistently performs at a high level under variable workloads, and has a passion for making a positive impact on client’s lives.*

**Responsibilities**

* On-boarding new clients
* Assisting in preparation for and follow-up from client reviews
* Responding to client service requests
* Preparing investment proposals
* Supporting multiple roles across the firm – advisory, financial planning, operations, relationship management – through a variety of tasks
* 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 themself to manage a variety of tasks and solve problems with little oversight.

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

* Strong organizational skills and follow-through
* Introductory understanding of financial planning concepts, advisory operations, and client paperwork
* Education or work experience in the wealth management field

**Required Skills/Experience**

* 1-3 years in investment management business, preferred
* CFP® certification or on track to obtain certification, preferred
* Introductory knowledge of various financial planning and investment concepts
* Demonstrated 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) or ability to obtain them within 60 days

Send resumes to: Matt Powers [mpowers@frontierinvest.com](mailto:mpowers@frontierinvest.com)