



## WEALTH ADVISOR – DENVER

Frontier is a registered investment advisory firm that offers a comprehensive range of financial services and advice to high net-worth clients throughout the United States. This Wealth Advisor will initially assist four Senior Wealth Advisors (all CPAs and CFPs) with financial planning projects, tax preparation and planning, and overall implementation and support of client needs. We expect the Wealth Advisor will deepen his or her relationship with existing clients as well as introduce new client relationships along the path to becoming a Senior Wealth Advisor. This position is ideal for a CPA who is transitioning to a career in wealth management.

### RESPONSIBILITIES / ROLES

- Practice Frontier's Core Values
- Commitment to continual learning and personal development
- Support Senior Wealth Advisors in efforts to maintain and enhance our proactive, high-touch client service experience
- Perform various planning activities in retirement, investment management, income tax, estate, risk management, college, debt management, and charitable gifting matters
- Prepare income, gift and estate tax returns
- Engage with existing clients to strengthen relationships and develop trust (with emphasis on next generation)

### QUALIFICATIONS / REQUIREMENTS

- Certified Public Accountant with relevant experience in individual and trust taxation
- Certified Financial Planner certification will eventually be required
- Three to six years' professional experience, preferably client-facing
- Excellent communication skills
- Ability to think and execute at both a detailed and high-level
- Team player, results driven, "get-it-done" attitude

### BONUS QUALIFICATIONS/SKILLS

- Local connections with influential people in the Denver Market
- Have existing transferable client relationships

### EMPLOYMENT DETAILS

- Full Time Salaried Position with opportunities to earn bonuses
- Insurance: medical, vision, dental and life. Paid time off. 401(k) plan
- Private & Collaborative Office Environment
- Increased work hours during "tax season" and some light travel is expected

***For more information, email [information@frontierwealth.com](mailto:information@frontierwealth.com).***

Transparent | Engaged | Resourceful | Advocates

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