FRONTIER
WEALTH MANAGEMENT

Portfolio Strategist

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 business 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.

We are in search of a Portfolio Strategist who has experience creating robust investment portfolios for high-net-worth individuals and driving consistency across multiple advisory teams. This individual needs to have a strong understanding of individual investments as well as macroeconomic themes and must possess the ability to effectively communicate his/her investment thesis to the broader team.

RESPONSIBILITIES/ROLES:

- Conduct due diligence on traditional and alternative investments the firm recommends to its clients
- Analyze macroeconomic and capital markets information used to make asset allocation decisions
- Perform and document on-site visits of managers
- Monitor recommended managers quantitatively and qualitatively by analyzing their portfolio performance, holdings and transactions
- Build in-house portfolios with the support of our strategic partners and provide commentary and summary stats to support when and why to use each specific portfolio
- Leverage technology platform to streamline trading and rebalancing across the firm
- Provide agenda and materials to lead monthly IM Committee meetings
- Make recommendations to IM Committee based on due diligence, analysis and construction of portfolios and investments
- Lead quarterly conference calls with all advisors in the firm to give updates on our current portfolios, explain changes made to the portfolios and make recommendations on a go-forward basis
- Contribute to white paper research and quarterly market commentary that can be used by our marketing team
- Oversee fund lineups in our home office corporate 401(K) plans

QUALIFICATIONS/REQUIREMENTS:

- Bachelor's degree
- CFA designation
- Eight years of experience in the investment industry
- Strong written and verbal communications skills
- High level of team orientation and strong interpersonal skills
- Ability to multitask, manage multiple priorities and meet deadlines in a rapidly changing environment
- Team player, results driven, "get-it-done" attitude

EMPLOYMENT DETAILS:

- No existing book of business required
- Full-time salaried position with opportunities to earn bonuses
- Competitive Benefits: Medical, dental, vision and life insurance; 401(k) plan with match; Flexible schedule
- Collaborative office environment and fun culture

For more information, email information@frontierwealth.com