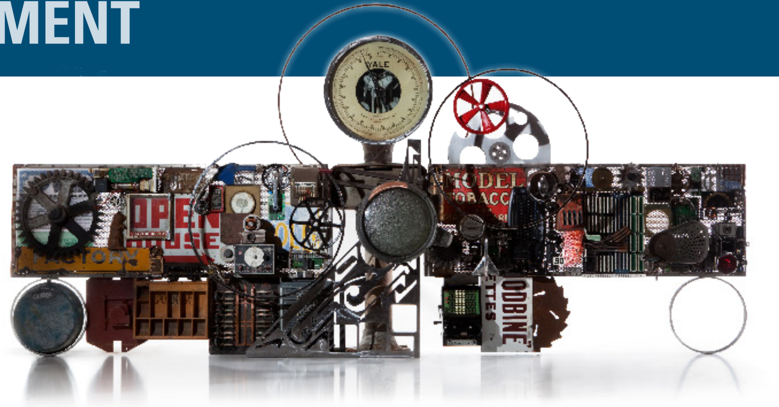
AT A GLANCE:
FRONTIER WEALTH MANAGEMENT

ABOUT FRONTIER



Frontier Wealth Management is a privately owned Registered Investment Advisory firm focused on providing a boutique experience. Guided by our core values of transparency, engagement, resourcefulness and advocacy, the firm was founded with a mission to bring an enhanced level of expertise and service to the hard-working families we are surrounded by each day. Our global approach brings a broad level of expertise and service, resulting in a financial path that is specific to our clients. We believe creating this path is the best way to help guide our clients' life journey.

TEAM DETAILS

44
NUMBER OF EMPLOYEES

- **21** WEALTH ADVISORS
- **15** SUPPORT STAFF
- **5** SPECIALISTS
- **3** EXECUTIVE OFFICERS

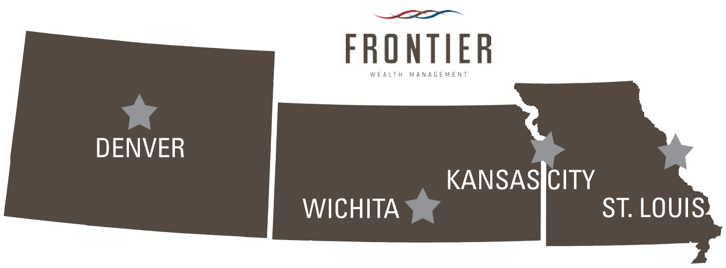
AUM
$1.5 BILLION

1.05:1
RATIO OF ADVISORS TO SPECIALISTS/ SUPPORT STAFF

SERVICES SUMMARY

- In-depth financial planning and maintenance
- Investment management (traditional and alternative strategies)
- Insurance and risk management solutions and opportunities
- Generational wealth transfer education and execution
- Corporate retirement, pension and endowment solutions
- Retirement planning analysis
- Tax planning
- Business succession ideas
- Outside Account Data Aggregation
- Estate planning
- Treasury management programs

FRONTIER'S FOOTPRINT



WHY FRONTIER?

- Team approach
- A clear direction and vision
- Strong values
- Everyone's voice matters
- Flexibility
- Energy and enthusiasm
- Fun and collaborative work environment
- Above industry compensation
- Company benefits
- Robust platform
- Strong desire to grow
- Regional presence
- Dedicated leadership

TRANSPARENT ▶ ENGAGED ▶ RESOURCEFUL ▶ ADVOCATES

WWW.FRONTIERWEALTH.COM