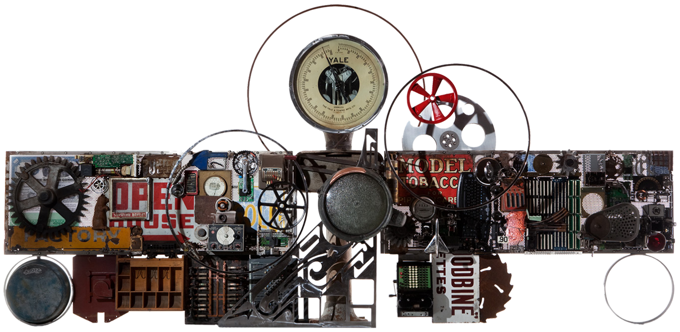
AT A GLANCE:
FRONTIER WEALTH MANAGEMENT

As of 12/10/20

ABOUT FRONTIER

Frontier offers a full range of financial planning, investment advisory, risk management and other wealth management solutions to individuals, families and business professionals. We create customized plans tailored to our clients' unique circumstances and goals. Our purpose is to identify and create solutions that seek to simplify our clients' lives and empower them with confidence.



57 EMPLOYEES

- **26** WEALTH ADVISORS
- **16** SUPPORT STAFF
- **11** SPECIALISTS
- **3** EXECUTIVE OFFICERS

1.08:1
RATIO OF **SPECIALISTS/ SUPPORT STAFF** TO ADVISORS

COMPANY-WIDE CREDENTIALS

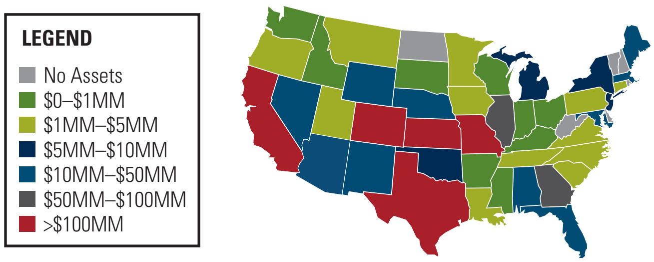
CFP:	11	CDFA:	1	PFS:	2
JD:	3	ChFC:	1	CFM:	1
CPA:	5	CFA:	1	PM:	1
MBA:	5	CTFA:	1		

ASSETS
$3.5 BILLION

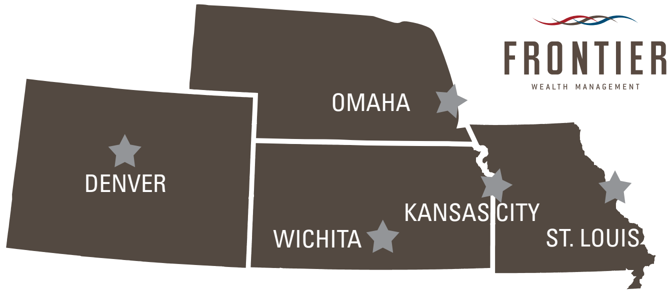
SERVICES SUMMARY

- In-depth financial planning and ongoing plan maintenance
- Investment management (traditional and alternative) strategies
- Insurance and risk management solutions and opportunities
- Corporate retirement, pension and endowment solutions
- Estate planning design and maintenance
- Generational wealth transfer education, design and execution
- Retirement planning analysis
- Social Security analysis
- Tax planning and preparation services
- Business succession ideas
- Treasury management programs
- Outside account data aggregation and monitoring

GEOGRAPHICALLY DIVERSE AUM PROFILE



FRONTIER'S OFFICE FOOTPRINT



FRONTIER
WEALTH MANAGEMENT

WHY FRONTIER?

- A collaborative team of in-house specialists working together to meet your complex needs
- Family office approach to client experience
- Strong Core Values
- Personalized long-term view of your objectives
- Comprehensive goals-based financial planning
- Clear direction and vision
- Expertise in alternative investments for increased diversification

BE PART OF SOMETHING GREAT!

this way. ▶

TRANSPARENT ▶ ENGAGED ▶ RESOURCEFUL ▶ ADVOCATES

WWW.FRONTIERWEALTH.COM CONNECT WITH US: