AT A GLANCE:
FRONTIER WEALTH MANAGEMENT

As of 6/30/21

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.

FRONTIER
WEALTH MANAGEMENT

52 EMPLOYEES

- **25** WEALTH ADVISORS
- **10** SUPPORT STAFF
- **14** SPECIALISTS
- **3** EXECUTIVE OFFICERS

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

COMPANY-WIDE CREDENTIALS

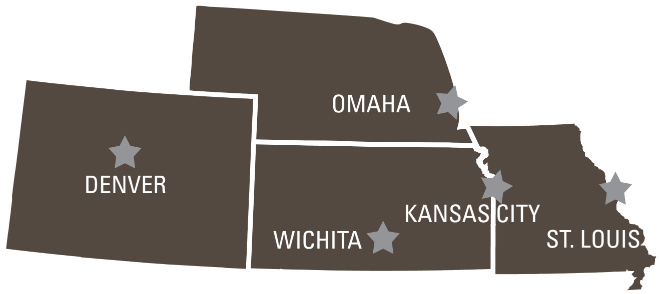
CFP:	11	ChFC:	1	PM:	1
JD:	3	CFA:	1	AIFA:	1
CPA:	4	CTFA:	1	CRPC:	1
MBA:	5	PFS:	2	FPQP:	2
CDFA:	1	CFM:	1		

ASSETS
$3.9 BILLION

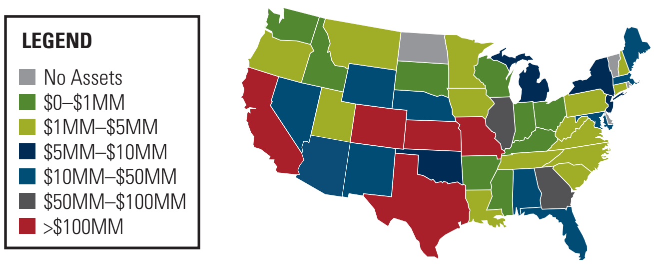
SERVICES SUMMARY

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

FRONTIER'S OFFICE FOOTPRINT



GEOGRAPHICALLY DIVERSE AUM PROFILE



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