

Frontier Advisors Pty Ltd

Position Description

September 2018

Position:	Associate
Incumbent:	tba
Reports to:	tba

Position Objective

To ensure the delivery of high quality investment and strategic advice and research to Frontier clients involving:

- Client work management and relationships;
- Manager research;
- Capital markets research;
- Investment research;
- Specialist projects; and
- Associated business responsibilities as directed by the CEO.

Key Responsibilities

Client Work Management and Relationships

Undertake client work and build and consolidate client relationships as directed by the Client Team Leader(s) by:

- Maintaining awareness at all times of the clients to which you have been allocated;
- Providing high quality and timely investment advisory support to clients, including analytical work (e.g. performance calculations, portfolio analysis and monitoring of mandates) and report/letter drafting, and become valued by the client and the Client Team Leader for that client;
- Ensuring that work is subject to Frontier's Quality Assurance processes;
- Endeavouring to continually broaden experience through the process of drafting parts of major reports and material for clients;
- Being involved in client meetings, where appropriate, and learning from experienced consultants;
- Raising issues proactively with the Client Team Leader;

- Demonstrating initiative and pro-activity towards clients and service delivery;
- Developing and maintaining an appreciation of the overall range of services provided by Frontier, and which Frontier staff members have expertise in various areas.
- Maintaining full and up to date work lists for your clients; and
- In consultation with your Client Team Leader, ensuring your client contracts are serviced to specifications without over-servicing.

Client allocations are based on business requirements and linked to individual capabilities. Client allocations will be decided by the Director of Consulting in consultation with the Line Managers.

Manager Research

Where requested, undertake manager research to maintain and improve your and the firm's knowledge and understanding of managers dealt with on behalf of clients as well as other relevant managers, and enhance your capacity to provide research support to other Frontier staff as directed by your Research Team Leader by:

- Providing strong support to the Research Team Leader and senior team members, including effectively contributing to idea development and undertaking assigned role within the team to ensure that manager intelligence is disseminated throughout Frontier in a timely manner;
- Being an active participant in the manager research process, including the manager review and rating process, the preparation of due diligence documents such as annual reviews, MAPS and other documents;
- Delivery of SharePoint content that is sufficient, up to date within agreed deadlines and of high quality. SharePoint content includes regular monitoring for investee managers, annual reviews for invested managers and any other due diligence materials prepared as part of the manager review and ratings process;
- Seeking advice/support from more experienced team members where required; and
- Assisting in other research teams as needed or as directed by the Director of Research.

Research team allocations are based on business requirements and linked to individual capabilities.

Capital Markets Research

Where requested, carry out capital markets and asset allocation research to improve your and the firm's knowledge and understanding of capital markets and related issues faced by clients, and enhance your capacity to provide capital markets research support to other Frontier staff as directed by the Capital Markets Team Leader by:

- Making a strong contribution to the preparation of the Annual Secular Outlook and the Quarterly Market Outlook;
- Working, as required, with the Capital Markets Team Leader and other senior team members on the annual review of the proprietary Capital Market Assumptions (CMA), and the annual preparation of scenario testing and stress testing;

- Undertaking relevant economic and financial market research pieces;
- Working with the Capital Markets Team Leader to provide client communications on key market events in a timely way; and
- Assisting in other Research Teams as needed or as directed by the Director of Research.

Investment Research

Actively participate in Frontier's investment research program, broaden investment knowledge to expand Frontier's intellectual capital and add value to clients' portfolios by:

- Specialising in assigned areas and areas which have the potential to add value to Frontier. Areas of specialisation are used for manager and investment research and may be developed with the goal of becoming a subject matter expert to assist other Frontier staff;
- Contributing to assigned research papers and/or projects within agreed timeframes, with appropriate peer review and in the appropriate format; and
- Reading as widely as possible to ensure that knowledge levels are at an appropriate standard.

Specialist Projects

Where requested, actively participate in Frontier's specialist projects and development program within a Specialist Team by:

- Specialising in the assigned project areas, the allocated areas of interest and developing new areas which have the potential to add value to Frontier;
- Completing assigned tasks, development work and projects within agreed timeframes for the Specialist Team; and
- Working with Client Teams and clients in the areas of specialisation covered by the Specialist Team.

Business Responsibilities

Business responsibilities involve:

- Contributing to business planning and marketing as requested by the CEO;
- Conformity with the Frontier Compliance and Risk Management Manual;
- The raising of your personal profile outside and inside Frontier;
- Providing effective and continuous feedback to other staff; and
- Leading by example.

From time to time, you may be required to be involved in special projects that have been determined on a research needs or business needs basis.

Knowledge/Skills/Experience

The following capabilities are requirements of the position:

- Relevant experience within investment consulting or a related field, and appropriate graduate qualifications;
- Exemplary interpersonal skills and an ability to work in, and contribute to, a team environment by working co-operatively and effectively in an environment of mutual respect to ensure that:
 - All work is of high quality and delivered in a timely manner;
 - Other Frontier staff are involved in work where they have particular expertise or specialisation;
 - Support and back up are provided to other staff in relation to work; and
 - Work is delegated appropriately and effectively to the person most suitably qualified to undertake the work whilst at the same time retaining responsibility for the completion of that work;
- Excellent verbal and written communication skills and an ability to communicate at all levels including:
 - Presenting to clients and staff in a professional and confident manner;
 - Communicating with external parties in a professional and appropriate manner;
 - Giving and receiving feedback positively, constructively and consistently;
 - Taking appropriate action if it is unlikely that a deadline can be met;
- Excellent organisation skills, an ability to work autonomously, set priorities and work to deadlines;
- A strong desire to take pride in your work and in how you represent yourself and Frontier;
- Strong MS Word, MS Excel and MS PowerPoint skills, with a particular emphasis on strong Excel skills;
- A commitment to maintaining capabilities in relation to software programs relevant to Frontier's work including Bloomberg, Mercer Insight and other relevant programs;
- Continually seeking to broaden your experience;
- A willingness to embrace and adapt to a dynamic work environment; and
- An ability to work within a commercially sensitive environment, maintain confidentiality and comply with internal policies and procedures.