The Frontier Group

Financial Planning

Private Wealth Management

We understand and appreciate you've worked hard for everything you have and working with the right financial advisor is important. When clients work with us we take the time, through in-depth conversations, while following our wealth management process to gather insights about your unique personal and financial situation so that we can build an individually tailored financial plan to meet your objectives.

Financial Planning is an extremely valuable service that many business owners take on themselves without the expertise to tackle the various aspects of their life. While planning for your business is paramount, we spend time integrating your personal and business financial goals to ensure that both components are aligned.

Retirement income planning.
Our team can work with you to help preserve your lifestyle and livelihood in retirement. We will help you understand such influences as risk and investment time horizon, evaluate your current asset allocation and help you maximize your Social Security benefits.

Trust and estate planning strategies.
We have the experience and the network to address the complexities of your advanced planning needs. We can help with preserving your assets, reducing estate tax exposure, transitioning wealth to future generations and pursuing philanthropic endeavors.

Tax strategies.
Through open and continuous dialogue with your tax professionals, we'll review your returns and prepare an integrated strategy. We create tax-efficient portfolios and construct highly customized family gifting solutions.

Tailored lending and business planning.
Through UBS you can access innovative personal and business solutions such as securities-backed lending, mortgages and tailored financing.

Insurance.
We view insurance as a tool to help protect your family's assets, replace income, and create a legacy for future generations and philanthropic beneficiaries. We objectively analyze all your current policies—including long-term care—to determine whether they meet current and future needs.

Philanthropy.
We'll work with you and family members to provide education on philanthropy and participation strategies for the next generation. Our advice addresses your philanthropic mission statement, as well as assessments of your current charitable goals, contributions and associations.

The Frontier Group
UBS Financial Services Inc.
Private Wealth Management
3000 A Street
Suite 100
Anchorage, AK 99503
907-261-5964

advisors.ubs.com/frontiergroup