Valley Forge Investment Consultants, Inc.
OPEN POSITION
Retirement Service Consultant

Company Background:

Valley Forge Financial Group was founded in 1967 to assist business owners and their families with life insurance analysis, along with robust estate and wealth transfer planning. Some 50 years later, our organization has grown to serve hundreds of clients, providing professional services in the following areas:

1. **Life Insurance and Estate Planning**
2. **Wealth Management and Investment Advisory Services for Individual and Institutional Investors**
3. **Private Equity and Private Real Estate Investments**
4. **Third-Party Qualified Retirement Plan Design, Administration and Compliance**
5. **Multi-generational Family Office Services**

Our Team of professionals serves a national clientele, with an emphasis on building long-term relationships.

Team Overview:

Valley Forge Investment Consultants, Inc. ("VFIC") is an independent and objective registered investment advisor registered with the Securities and Exchange Commission. We assist individual and institutional investors with the management of more than $1 billion of investable assets. VFIC has two distinct business offerings for our clients – 401(k) Fiduciary Services and High Net worth Wealth Management. Our Investment Advisors work closely with our Operations Team to provide our clients with a seamless professional relationship, spanning all aspects of the client experience.

Job Summary:

The Retirement Service Consultant specializes in employee communication and education in the areas of retirement planning and financial wellness. Advisors for these employer-specific projects should have experience in employee benefits, or 401(k) retirement plans. A financial background, with appropriate licenses, is required in order to explain retirement plans and specific investments to our clients and their employees. This important member of the team must possess a passion to help people reach their financial goals with the highest standards of ethics and integrity.

Scope of Responsibility:

Associates in this position are comfortable speaking in front of groups (small and large), possess knowledge of qualified retirement plans, strong interpersonal skills, and are responsible, punctual and reliable with a strong sense of integrity and quiet confidence. Adaptability, a good sense of humor, and a desire to help others are critical for the role. The ability to work in a fast-paced environment, maintain a flexible schedule for travel, and ability to problem solve independently are essential.

Ideal Candidates:

- Strong command of Spanish language is required, must be able to translate and create presentations (written and oral) in both English and Spanish
- Maintain a base of knowledge of the retirement plan business and stay current on legislative updates and product changes
- Establish and preserve good working relationships with employer and client contacts
- Educate participants on all aspects of the client's retirement plan, including answering questions regarding the plan's features and benefits
- Assist current participants with issue resolution and re-enrollment (as applicable)
- Complete paperwork and expense report post-travel in a timely manner
- Provide highest quality client service by responding to participant phone or email inquiries within 24 hours and providing account and plan information from various recordkeeping and administration systems
- Identify routine participant needs and problems with urgency, professionalism, and efficiency; determine alternative solutions; resolve problems using current workflow procedures
- Assist participants with account inquires and transactions, hold discussions of unique tax treatments and plan provisions, including explanation of plan provisions, plan documents and forms for bilingual participants
- Provide basic investment fundamentals when explaining mutual fund performance and retirement planning
- Participate in special projects and perform other duties as assigned

Company-provided Benefits:

1. 401(k) plan with discretionary profit sharing company match
2. Health Benefits
    a. 100% paid for employee
    b. contributory plans for families and dependents
3. Life Insurance
4. Disability Insurance

Interested candidates should send your resume to HR@VFFG.com