



**Valley Forge Financial Group, Inc.**  
**King of Prussia, PA**  
[www.vffg.com](http://www.vffg.com)

**Job Title:**

Vice President – Valley Forge Private Equity, Inc.

**Company:**

Valley Forge Financial Group (VFFG), headquartered in King of Prussia, Pennsylvania is a vibrant company, serving the financial services needs of the ultra-wealthy.

Established in 1967, the company specializes in five comprehensive financial services:

1. Life Insurance and Estate Planning
2. Wealth Management and Investment Advisory Services for Private and Institutional Investors
3. Fund-of-Funds and Direct Investment Opportunities to Accredited Investors and Qualified Purchasers
4. Third-Party Qualified Retirement Plan Design, Administration & Compliance
5. Multi-generational Family Office Services

**Department Overview:**

Valley Forge Private Equity creates and manages top-tier partnership opportunities for investment in Private Equity and Real Estate. Its mission is to provide institutional access to the best performing investments at below-market fees. Its primary investor base is from clients of Valley Forge Financial Group affiliate companies.

Since its inception in 2002, VFPE has completed eleven private equity fund of funds and two real estate private placements and boasts a track record of greater than 2.1x multiple of money and 22% Internal Rate of Return for investors, net of all fees.

**Position Overview:**

This position is for an outgoing, dynamic self-starter who is seeking a challenging, financially rewarding career to co-manage a team of professionals who are administering existing portfolios and creating new investment opportunities.

Responsibilities for the position will include:

- A. Strategy
  - Budgeting and strategic planning for new initiatives
  - Sourcing and negotiating joint-ventures and co-branding
- B. Fund Formation
  - Investment Committee agenda and planning
  - Planning and running LP meetings
  - Compliance
- C. Fund Administration
  - Investor relations and regular contact
  - Client communications and white papers
  - Marketing and positioning of VFPE
- D. Special Projects
  - Regular brochure and track record updates
  - Direct investment sourcing and due diligence
- E. Manager Relationships
  - Co-investment sourcing
  - Annual meeting attendance
  - Industry networking and market pulse
- F. Due diligence
  - Reference checks
  - Regular contact with industry-leading LPs

**The Ideal Candidate should possess:**

- Minimum of ten years in financial services
- Series 6 or Series 7 license preferred but not required
- Proven ability to think and perform strategically, bringing innovative solutions to complex challenges
- Strong analytical skills and experience with database management, Excel and the Microsoft software suite
- Experience with managing a team and direct P&L oversight
- Proven ability to practice discretion in confidential matters
- Strong verbal and written communication skills

**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
5. Tuition Reimbursement Program

**Contact Information:**

Email: [hr@vffg.com](mailto:hr@vffg.com)