Valley Forge Investment Consultants, Inc.
OPEN POSITION
Investment Adviser

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 adviser 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 Advisers 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 Investment Adviser position is suitable for a dynamic investment professional with an interest in helping individuals and institutions manage and grow their wealth. This position will involve two to three years of rigorous on-the-job training with an experienced principal of the firm, learning the specifics of our approach to investment consulting for high net worth investors and qualified retirement plans. Applicant must be a self-starter and, at the same time, thrive and work well in a team environment. Experience in the investment industry and FINRA Series 7 and 65 licenses are not a requirement, but would provide a baseline of industry knowledge that would be helpful for the applicant.

Scope of Responsibility:
The individual securing this position will ultimately be responsible for finding and securing new business. Specifically, with proper training, this position will focus on prospecting for new clients, advisers and centers of influence, onboarding new investment clients in conjunction with our Operations Team, maintaining consistent contact and communication with clients and providing ongoing service (management, proactive recommendations, etc.) to investors. All services provided and contact with clients, prospects and advisers will be conducted in conjunction with our Code of Ethics, and will be delivered the "Valley Forge" way.

VALLEY FORGE
FINANCIAL GROUP

Ideal Candidates:

- College graduate with business degree (minimum GPA 3.0)
- Ability to prepare for and obtain FINRA Series 66
- "Shadow" principal of Valley Forge Investment Consultants for first two years - requires travel
- Learn and master the One Card System and Success Manual recordkeeping methodology for sales
- Provide assistance on case history, working with research team on cases, preparing analysis and special project reports for prospect and investors
- Continuing education based on area of specialization (retirement plans, high net worth, etc.)
- Consistent and diligent pursuit of new, qualified contacts to discuss the deep history, multiple service offerings and value proposition of Valley Forge Financial Group
- Creative "drip" campaigns to stay in touch with prospects (meetings, telephone, social media, etc.)
- Obtain pertinent facts from prospects and begin investment analysis process with Operations Team
- Present analysis and recommendations to prospective investors in face-to-face meetings
- Foster clear communication with Operations Team and analysts, effectively articulating client goals and objectives and our suggested strategy for each case to develop analysis and recommendations
- Conduct periodic client meetings to review portfolio allocation, performance and structure
- Lead the onboarding process for new clients, in conjunction with the Operations Team
- Assist investors with any account or strategy-related requests

Company-provided Benefits:

1. 401(k) plan with discretionary profit sharing and 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 their resume to HR@VFFG.com

PLEASE VISIT OUR WEBSITE www.VFFG.com TO LEARN MORE ABOUT OUR HISTORY BEFORE APPLYING.