



About Us: Valley Forge Financial Group (VFFG) is a boutique wealth management and financial planning firm renowned for its dedication to bringing financial health, security, and peace of mind to high net worth and ultra-high net worth clients. We take pride in our unwavering commitment to responsibility, respect, and excellence. Join us in fostering a culture of continuous learning, transparency, and vibrant community engagement.

Summary: Are you ready to dive into the world of financial services with a company that values growth, integrity, and teamwork? At VFFG, we don't just offer jobs—we build careers. We're looking for a dynamic and driven individual to oversee the financial reporting and cash management of the firm.

What You'll Do

Reporting directly to the President, the Controller will serve as a key financial partner to the firm –ensuring accuracy, consistency and accountability across all areas of finance. Your role will be hands-on and detail-oriented, with a strong focus on execution and process improvement. In this role, you'll work closely with leadership and operate within clearly defined responsibilities. Your attention to detail and strong sense of accountability will be critical to maintaining the financial health and operational integrity of the firm.

- **Support executive decision-making** by preparing accurate monthly financial statements, reports, and KPIs across business units.
- **Oversee day-to-day accounting operations**, including cash management, bank reconciliations, invoicing, collections, payroll, and expenses.
- **Maintain equity and ownership records**, ensuring accuracy and compliance with internal structures and external reporting.
- **Lead the budgeting process**, coordinating with departments to develop realistic, strategic financial plans and maintain alignment with company objectives.
- **Ensure regulatory compliance** by managing timely tax filings, reporting obligations, and internal controls.
- **Refine and enforce accounting procedures**, ensuring efficiency, clarity, and adherence to best practices.
- **Identify and recommend technology tools** to improve workflow and support the firm's strategic and operational goals.
- **Collaborate across departments** to ensure alignment between financial operations and company priorities.

Qualifications

Education and Experience:

- Bachelor's degree in finance, accounting or the equivalent combination of education and experience
- Six (6) years or more of accounting experience
- CPA or CPA-track, preferred

Skills:

- Strong analytical skills and experience with database management
- Prior supervisory experience, strongly preferred but not required
- Proven ability to practice discretion in confidential matters
- Strong written and verbal communication skills
- Strong organizational skills
- Ability to set and manage priorities, adjust workflows, and meet deadlines
- Ability and willingness to learn new and changing systems
- Demonstrated ability to identify and implement solutions, strong problem-solving skills
- High level of attention to detail
- Proficiency in Microsoft Office, specifically Excel
- Proficiency in NetSuite, implementation experience preferred but not required

Why You'll Love Working Here

- **Impactful Work:** Your role will directly contribute to the financial well-being of our clients and the success of our firm.
- **Supportive Environment:** We're committed to ongoing learning and professional development, and we love seeing our team members grow.
- **Vibrant Culture:** We believe in working hard and having fun—after all, when you enjoy what you do, it's easier to achieve great things.
- **Inclusive Culture:** Enjoy a long history of inclusion and collaboration within and across teams.
- **Community Engagement:** Be part of a firm committed to giving back to the communities where we live and work.
- **Professional Growth:** Benefit from a culture that promotes from within and supports continuous learning.
- **Outstanding Service:** Join a team dedicated to providing high-touch service and paying attention to the details that matter.

Embody Our Core Values:

- **Be responsible and accountable:** Every Team Member at VFFG is held responsible and accountable for themselves, colleagues, clients and the company. We take pride in the quality of work we deliver and ensure our intentions are in the best interest of our clients.
- **Respect everyone.** Respect is the foundation of society. Team Members of Valley Forge Financial Group exhibit respect in all aspects of our lives.
- **Deliver the best possible results.** It is our priority to provide thoughtful, timely and accurate results in our work.
- **Be committed.** Our founders built this company by embracing patience, dedication and commitment. We strive to emulate these values in all that we do.
- **Protect confidential information.** We maintain the integrity and confidentiality of all information provided to us by our clients. Continuous training and vigorous enforcement of our policies are designed to protect sensitive information.
- **Never stop learning.** Ongoing self-improvement and professional development are keys to a successful organization. We support our Team Members in their pursuit of education and training.
- **Create value.** We create value through the work we produce, the relationships we make, and the way we represent Valley Forge Financial Group and the community.
- **Be transparent and honest.** We welcome transparency and honesty to guide us in creating a productive environment. We are up front and open about the fees we charge for our services.

- **haVe Fun!** When we enjoy the people we work with and the environment we work in, it's much easier to focus on achieving our goals.

Employee Benefits:

- Unlimited vacation under our generous open paid time off policy, coupled with the attitude “when you're away, you're away!” so each employee can refresh when they take time off
- 100% paid medical benefits for single coverage, with an annual contribution of \$3,000 to the employee-owned HSA, which vests immediately upon contribution
- Employer sponsored 401k plan, employer match of 50% of up to 6% employee deferrals which vests immediately upon contribution
- Flexible work environment with a hybrid schedule of 4 in-office days, and 1 remote day per week
- Mandatory 2 week, fully paid sabbatical for employees upon 5-year anniversary, 4 weeks upon 10-year anniversary, and 6 weeks for each subsequent 10-year anniversary
- At least 4 weeks fully paid parental leave program
- Focus on continuous training and education, including tuition reimbursement
- Company sponsored charitable giving fund, matching employee charitable contributions up to \$500 annually, in addition to supporting causes our employees are passionate about
- 11 paid company holidays each year – following the NYSE holiday schedule
- Awarded a Great Place to Work (2024) and Best Places to Work in PA four years in a row (2020 to 2023)
- Being a meaningful member of our growing, and constantly evolving team, where we take pride in each other and the service we provide to our clients, supporting each other with compassion, respect, and enthusiasm for success

Join Us: If you're ready to be a key player in a company that values excellence, integrity and client satisfaction, apply today and let's make a difference together!

Application Process: Submit your resume to hr@vffg.com. VFFG is an affirmative action-equal opportunity employer. All qualified applicants will be considered for employment without regard to their race, color, creed, religion, sex, pregnancy, national origin, ancestry, citizenship status, age, marital or partnership status, sexual orientation, gender identity or expression, disability, genetic predisposition, veteran or military status, status as a victim of domestic violence, a sex offense or stalking, or any other classification prohibited by applicable law.

As a registered investment adviser, employees of VFFG may be subject to certain limitations on political contribution and personal investment activities.

If you need a reasonable accommodation to complete your application, please contact Human Resources at hr@vffg.com.