



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 join our Rotational Operations Program, an exciting entry-level opportunity designed to give you hands-on experience across key areas of our business.

What You'll Do

Over a two-year period you will rotate through our estate planning team in support of life insurance service, underwriting and case design. You will gain a comprehensive understanding of our operations while developing the skills needed to transition into a client-facing advisory role.

- **Client & Policy Service:**
 - Support advisors and clients directly with fulfillment of client requests with efficiency and accuracy.
 - Communicate with clients via email and phone, ensuring exceptional service and responsiveness.
 - Prepare professional correspondence, including memos and letters, on behalf of advisors.
 - Assist clients with account and policy forms, ensuring proper completion and compliance.
 - Finalizing estate reports and insurance audits by maintaining accurate formatting and error-free documentation.
 - Keep client policies updated in our CRM, ensuring precise and current information.
- **Underwriting:**
 - Pioneer innovative solutions in managing and processing life insurance applications.
 - Coordinate underwriting requirements with precision, ensuring every detail is met.
 - Gain knowledge in insurance guidelines and underwriting practices, becoming a trusted resource.
 - Champion our spirit of transparency and high-touch service by building lasting client relationships.
- **Case Design:**
 - Research life insurance products, industry trends, and carrier ratings to identify the best solutions.
 - Use proprietary software to create and refine life insurance illustrations that align with client goals.
 - Develop clear, compliant presentations using Excel, PowerPoint, and industry tools like Ensign and eMoney.
 - Track policy performance, summarize key data, and assess corporate deferred compensation plans.

Qualifications

Education and Experience:

- Bachelor's degree in finance, business, or a related field

Skills:

- Strong knowledge and/or interest in estate planning and insurance products
- Excellent interpersonal and communication skills
- Detail-oriented
- Ability to set and manage priorities, adjust workflows, and meet deadlines
- Proficiency in Microsoft Office.
- Ability to learn and adapt to new and changing systems
- Proven ability to practice discretion in confidential matters

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.