About Us: We're not your typical wealth management firm. As a boutique financial planning partner, we deliver more than strategies—we deliver clarity, confidence, and peace of mind to high-net-worth and ultra-high-net-worth clients who deserve the best. Our reputation is built on responsibility, respect, and an uncompromising drive for excellence.

What makes us different is our culture. We foster continuous learning, champion transparency, and thrive on collaboration. Our people don't just work here - they grow here, surrounded by a team that values curiosity, creativity, and impact. And beyond the numbers, we're deeply connected to our community, bringing energy and engagement to everything we do.

Join us and be part of a firm where your expertise matters, your growth is supported, and your work makes a lasting difference.

Summary: We are seeking a driven **Investment Analyst** to join our growing team and support our mission of delivering thoughtful, research-driven wealth management to high-net-worth families.

This role is ideal for someone who wants to deepen their investment expertise, contribute to firm-wide strategic initiatives, and learn the fundamentals of prudent wealth management — all within a collaborative, people-focused environment.

What You'll Do:

Investment Research & Analysis

- Conduct deep-dive research on markets, asset classes, and investment managers
- Prepare research summaries, findings, and insights for client-specific projects and initiatives
- Maintain up-to-date knowledge of market trends, manager strategies, and economic conditions

Portfolio Construction & Strategy

- Build portfolio analytics to support allocation recommendations for clients and prospects
- Assess client risk tolerances, goals, and time horizons
- Generate proposals for new portfolio designs and investment strategies
- Participate in developing and refining the firm's investment models and processes

Trading & Rebalancing

- Execute trades in client accounts
- Produce rebalance action plans and implement trading recommendations
- Monitor liquidity needs and prepare recommendations
- Maintain accurate and compliant trading and research records

Client Support & Wealth Planning

- Prepare wealth forecast studies and scenario analyses, including Monte Carlo simulations
- Support Advisors and Associate Advisors during client meetings and presentation preparation
- Assist with sensitivity analyses, portfolio reviews, and planning-related projects
- Develop insights that help Advisors communicate investment decisions clearly and confidently

Data, Technology & Process Improvement

- Utilize proprietary and third-party tools to support research, analytics, and reporting
- Identify workflow or system inefficiencies and propose actionable improvements

- Assist in evaluating and implementing new technology solutions that enhance the investment process
- Help maintain data organization, system updates, and digital record integrity

Professional Development & Compliance

- Maintain required compliance documentation related to research and trading
- Pursue continuing education to stay current on industry regulations and best practices
- Work closely with due diligence managers to deepen understanding of products and platforms
- Engage in ongoing skill development to support long-term career growth

Qualifications

Education and Experience:

- Bachelor's degree in Finance, or related field.
- Two (2) to four (4) years of experience in a Finance related position.
- FINRA license (Series 65) or willingness to pursue license.
- Experience with investment research, trading, and planning software.
- Preferred software experience: Morningstar Office/Direct/Direct Advisory Suite, YCharts, eMoney, and Tamarac.
- Prior experience working with high-net-worth individuals, family offices, or multi-entity businesses, preferred.

Skills:

- Clear and professional written and verbal communication skills.
- Comfort learning new systems and technologies.
- High confidentiality standards and professionalism.
- Excellent organizational skills with ability to prioritize and manage multiple deadlines.
- Team-oriented with eagerness to learn and take on increasing responsibility.
- Strong proficiency in Microsoft Office Suite with advanced Excel skills (pivot tables, VLOOKUP/XLOOKUP, conditional formatting, multi-sheet linking, and error-checking techniques).

Work Environment:
This job operates in a professional office environment. The role routinely uses standard office equipment.

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.

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.
- **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.

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 weeks, 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 2025) and Best Places to Work in PA (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!

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.