



## **Client Services Specialist**

Valley Forge Family Office, Inc. | Audubon, PA (Hybrid)

**About Us:** At Valley Forge Family Office, we believe experienced accountants deserve challenging work, meaningful client relationships, and a life outside the office.

Our Client Services Specialist role is designed for accountants with approximately 2–3+ years of experience who are ready to operate at a Senior Accountant level, supporting complex client engagements while working directly with the individuals and businesses behind the numbers.

Unlike traditional accounting roles, our environment offers exposure to a wide variety of industries, business stages, and financial situations — without the stress of busy seasons or weekend work.

Here, you'll gain hands-on experience supporting high-net-worth families, entrepreneurs, and privately held businesses while developing new capabilities as we integrate advanced and emerging technologies into our client service model.

And unlike traditional accounting roles...no busy season, no weekends.  
Just great work with great people.

**Summary:** In this role, you will support the accounting and financial operations of a diverse group of clients, taking ownership of key responsibilities such as reconciliations, financial reporting, and month-end processes while helping ensure accurate and timely financial information. You will work directly with clients to answer questions, provide clarity around their financials, and support their evolving business needs. Rather than focusing on volume-driven work, this role allows you to engage more thoughtfully with each client, collaborate closely with your team to improve processes, and leverage modern technology to streamline workflows and enhance service delivery.

## **What You'll Do:**

### **Client Accounting & Financial Support**

- Maintain and reconcile client accounting records
- Prepare financial reports and customized reporting packages
- Assist clients with day-to-day accounting operations and financial insights

### **Technology & Process Innovation**

- Work with modern accounting platforms and automation tools
- Support system implementations and accounting workflow improvements
- Contribute ideas for improving efficiency through new technologies

### **Client Engagement**

- Collaborate with clients to understand their financial needs
- Help translate financial information into meaningful insights
- Support a wide variety of clients across industries and business stages

### **Team Collaboration**

- Work alongside experienced accountants and advisors
- Contribute to internal process improvements and best practices
- Participate in a collaborative environment focused on exceptional client service

## Qualifications

*To be considered for this role, you must reside in the Greater Philadelphia area.*

### **Education and Experience:**

- Bachelor's degree in Accounting, Finance, or related field
- Three (3) or more years of experience in a Senior Accountant role or similar in outsourced accounting services, corporate accounting, or related financial roles.
- Experience with bill pay platforms (e.g., Bill.com, Bill Pay powered by Melio) and payroll systems.
- Prior experience working with high-net-worth individuals, family offices, or multi-entity businesses, preferred.

### **Skills:**

- Proficiency in QuickBooks Online, including new file setups and system conversions.
- Demonstrated ability to build financial dashboards and advanced reporting tools in Excel or Power BI.
- Excel certification or other Microsoft Office specialist credential, highly desired.
- Strong proficiency in Microsoft Office Suite with advanced Excel skills (pivot tables, VLOOKUP/XLOOKUP, conditional formatting, multi-sheet linking, and error-checking techniques).
- Ability to understand and discuss financial statements (e.g., P&L, balance sheet, cash flow) with clients.
- Strong attention to detail and accuracy in accounting processes.
- Excellent organizational skills with ability to manage multiple deadlines.
- Clear and professional written and verbal communication skills.
- Ability to demonstrate discretion with confidential matters.
- Team-oriented with eagerness to learn and take on increasing responsibility.

### **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 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 two years in a row (2024 and 2025) 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!

*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](mailto:hr@vffg.com).