Pennsylvania Capital Management (PCM) is a registered investment advisor located in Willow Grove, PA. We are comprehensive financial planning and wealth management firm founded in 1995. At Pennsylvania Capital Management, we recognize there is no single path to building wealth. Each client's life experiences, goals and dreams are unique. Through our Five Step Wealth Management Process we develop uniquely personal financial plans and investment portfolios. The focus of our process is to get to know our client's mind set, priorities and financial experience level. Together we develop an integrated process, which will enhance their lives and build their portfolio returns in proportion to their risk tolerance and time horizons. We then create financial solutions that combine who our clients are with how they invest to help them get what they want out of life.

We are looking to attract a financial professional to help the PCM team communicate important planning and wealth advisory concepts to our clients. This position will be predominantly client facing and will require CFP® training which is essential to successfully integrate in this role within our team. This team member will work in close collaboration with the firm's Principal, Senior Investment Management Consultant. as well as the firm's client service team to help deliver planning and wealth management services to our clients.

<u>Major Duties/Responsibilities Include:</u>

-Meeting with the Senior Investment Management Consultant/CEO at least weekly to review upcoming client meetings and the important planning and investment initiatives for each client meeting.

-Becoming an expert in the PCM Five Step Wealth Management Process and PCM wealth management investment philosophy.

-Working with the Senior Investment Management Consultant/CEO to maintain and strengthen current high touch client relationships.

-Becoming a front stage client facing relationship manager who would educate and inform PCM clients with strategies and techniques to improve their lives and grow their portfolios.

<u>Qualifications:</u>
Required:
- Minimum five years of experience in a client facing financial services position
-Undergraduate degree from an accredited institution
-Knowledgeable in financial planning and estate planning concepts
-An outgoing personality complete with a "glass half full" approach to life
-Able to think on your feet and respond patiently to clients
-Highly organized
-Strong verbal and written communication skills
-Brings a positive spirit and a "can do" attitude to the firm
-Willingness to try new concepts and ideas
-High integrity individual with a creative approach to serving clients

Knowledge Level(Preferred but not necessary): CFP® or CFA® designation. Experience with the following programs: Orion, Advent Axys, Morningstar Office and/or Financial Planning Software.

Interested candidates should send their resume with cover letter, and salary history to irvin@pcmadvisors.com.