

Christopher N. Sorce, CFP[®]
Principal, Senior Financial Advisor



Christopher Sorce began his career as a financial advisor in 1976, joining the firm in his hometown of Erie, Pennsylvania, where his father had been advising clients since 1950. He continued with the firm after its acquisition by American Express Financial Advisors and in 1983 became one of the first financial professionals in Pennsylvania to earn the designation of CERTIFIED FINANCIAL PLANNER™.

In 1986, he moved from Erie to Washington D.C. to serve as managing principal of the American Express Financial Advisors office. It was there that Mr. Sorce developed a passion for a more objective, independent approach to advising his clients, free of the product bias typical of large institutional firms.

In 1994, Mr. Sorce returned to Erie, where his brother Gregory Sorce, CFP®, MSFS, was also working with American Express Financial Services; both had been ranked in the Top 100 of the nation's 8,000 American Express financial advisors. The brothers purchased the historic Wright House in downtown Erie and began serving clients as Sorce Financial Group in January 1995. Five years later, after distinguishing themselves with their commitment to personal financial planning and independent approach to investing, Hill, Barth & King LLC, one of the largest, most prestigious CPA firms in the country, approached the brothers to partner with the accounting firm and provide wealth management services.

A founding principal of HBKS® Wealth Advisors (HBKS®), Mr. Sorce serves clients throughout the United States from his offices in Erie and Naples, Florida. Like The Sorce Financial Group, HBKS has distinguished itself among wealth management firms through its in-depth approach to personal financial planning and disciplined investing. The firm has invested in sophisticated technology in order to efficiently monitor and tactically rebalance investment portfolios in volatile market conditions.

Likewise, HBKS has access to industry leading research and manager due diligence via a centralized Asset Management Unit and partnerships with external organizations like Fortigent. Additionally, HBKS clients benefit from access to insight on tax, valuation and other intellectual capital via the firm's affiliation with HBK.

As a senior financial advisor and principal of the firm, Mr. Sorce directs a team of ten professionals, including five certified financial planners to provide the highest level of service to each of their clients. Mr. Sorce earned his Bachelor of Arts degree from Boston University. He has served on numerous local and national community executive boards and professional associations over four decades.

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