

## Gregory J. Sorce, CFP<sup>®</sup>, MSFS

Principal, Senior Financial Advisor



As principal of HBKS, Mr. Sorce collaborates with the firm's partners and senior financial advisors to plan the firm's strategic direction. As a senior financial advisor, he leads a team of HBKS licensed advisors and administrators working directly with clients in Pennsylvania, Florida and across the country to plot their financial course and help them achieve their financial objectives.

Mr. Sorce began his career in financial services in 1982 as an advisor with Investor Diversified Services in his hometown of Erie, Penn., where his father had been providing financial advice to Western Pennsylvanians since 1950. He continued with the firm, which was acquired by American Express Financial Group, until 1995, when he and his brother, Christopher N. Sorce, CFP<sup>®</sup>, also with American Express Financial Group, purchased an historic building in downtown Erie and established their own financial advisory firm. Over the next five years, Mr. Sorce served as president, chief compliance officer and managing principal of HBKS Wealth Advisors, which distinguished itself for an exhaustive planning process and subsequent investment counsel independent of the proprietary product-driven approach typical of large institutional firms.

As developing a sound financial plan for their clients required collaboration with other professional advisors, in particular CPAs, whose direction was critical in addressing the ubiquitous tax ramifications associated with planning and investing, Mr. Sorce spearheaded the Sorce Financial Group merger in 2000 with HBK CPAs & Consultants, one of the nation's largest and most prestigious accounting firms. Mr. Sorce is a founding principal and senior financial advisor for the resulting HBKS Wealth Advisors, and continues his work with clients out of his offices in Erie and Pittsburgh.

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Widely recognized for his expertise in financial planning and investing, Mr. Sorce is frequently called upon by Pittsburgh and Erie media for insights on local and national financial matters. He hosted the weekly radio call-in show, “Money Matters” for four years for WLKK-AM and the nightly “Money Matters” news segment for Erie’s CBS-affiliate television station.

Mr. Sorce received his Bachelor of Arts degree from Boston University in 1977, his Certified Financial Planner™ designation in 1987 from the College for Financial Planning, and his Masters in Financial Services from The American College in 2007. He is active in his professional and local communities, a member of the Financial Planning Association, and past chairman of the St. Vincent Hospital Foundation and past member of the board of directors of Saint Vincent Hospital. He has served on numerous boards throughout his career.

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Insurance products offered through HBK Sorce Insurance LLC. CA Insurance License # 0F15964

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Securities offered through Purshe Kaplan Sterling Investments, Member FINRA/SIPC, headquartered at 18 Corporate Woods Blvd., Albany, NY 12211,

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