

Joseph E. Kloecker, MBA, CPA
Senior Financial Advisor



Joseph Kloecker offers his clients broad financial expertise amassed over more than 35 years – as a senior financial accounting officer in a large bank and as a financial planning and wealth management professional. Mr. Kloecker has an MBA and is also a CPA. Based in the Erie, Pennsylvania office of HBKS[®] Wealth Advisors (HBKS), he works exclusively with his clients, many of whom he has known for years through his extensive experience as senior vice president and controller of Northwest Pennsylvania's largest bank and through his varied and significant service to the community in a volunteer capacity.

Upon graduating from Gannon University, he began his accounting career in a staff accounting position at Marine Bank, which ultimately merged with PNC Bank. Marine Bank was the first bank acquired by PNC in the initial phase of deregulation of the banking industry in Pennsylvania. Mr. Kloecker served in a senior capacity for 20 years and was instrumental in the transition to PNC both at the local level and at the PNC Corporate Accounting level. In 1996, he left the bank to join The Sorce Financial Group, now HBKS Wealth Advisors since the firm's merger with Hill, Barth & King, LLC, in 2001.

As a senior financial advisor, Mr. Kloecker works holistically with clients helping them preserve and grow wealth, developing investment and wealth protection plans that meet their financial goals and achieve the objectives for themselves and their families provided for by that wealth. His client base is characterized by long-term collaborative relationships. Most of his clients are business people in or near retirement and their families, including many colleagues from his banking days as well as clients introduced to him by HBKS Partners and Staff.

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As a CPA, Mr. Kloecker brings a culture of attention to detail and a facility with the complex financial issues that are common to the finances of higher net-worth individuals and their families. He combines the analytical skills gained through his vast depth and breadth of experience with a commitment to personal financial planning and effective client communication and service. As HBKS Wealth Advisors is an independent Registered Investment Advisory firm, Mr. Kloecker and his colleagues provide independent and objective direction to clients.

Mr. Kloecker earned a B.S. in Accounting and an M.B.A. from Gannon University. He has always been very active in the local community, serving in leadership positions for a wide variety of professional and nonprofit organizations.

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