



## Professional Profiles

### Joseph E. Kloecker, MBA, CPA Senior Financial Advisor



Joe is a Senior Financial Advisor in the Erie, Pennsylvania office of HBK Sorce Financial LLC (HBK Sorce). He provides formal financial planning and investment advisory services to a wide array of individual clients and families. As a Senior Financial Advisor, he also lends his expertise to others in the firm as he develops and manages a team of professionals dedicated to serving their clients.

Before beginning his successful financial advisory practice in 1996, Joe previously served as Senior Vice President and Controller of the largest financial institution in Northwest Pennsylvania.

Joe has been very active as a volunteer of many organizations in Northwest Pennsylvania.

#### Education

- BS Degree in Accounting, Gannon University
- MBA Degree, Gannon University
- Certified Public Accountant
- FINRA Series 7 and 63 Licenses

#### Professional/Civic Associations

- Committee Member, Gannon University Annual Scholarship Golf Outing
- Member and Past Finance Committee Member, The Erie Club
- Volunteer, Saint Peter Cathedral Center
- Founder, Erie Opportunity Trade Fair
- Past President, Institute of Management Accountants
- Past Chair, Cathedral Prep Advisory Board
- Past Committee Member, United Way
- Past Committee Member, Flagship Niagara
- Past Committee Member, Erie Bicentennial

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