

# Caroline Jones, CFP® CRPC™ CRPS™

## Vice President, Financial Advisor



### Contact Caroline Jones

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**Caroline Jones has never waited for permission to lead.**

A TEDx speaker, four-time children's book author, and the inaugural Miss Pennsylvania Volunteer, she's built her life by chasing bold ideas and making them real.

Caroline is the kind of person who doesn't wait for doors to open; she builds them. In her career as a financial advisor, her passion is helping people find financial comfort. Whether it's a family planning their future, a nonprofit expanding its impact, or a small business navigating growth, Caroline is in it for the long haul to help generations to come.

### Listen Deeply & Learn Vibrantly

Education has always been one of her superpowers. Caroline graduated Summa Cum Laude from King's College with a Bachelor of Science in Business Administration, double majoring in Management & Marketing and minoring in Leadership Studies. She earned a Master of Science in Personal Financial Planning from the College for Financial Planning, and is currently pursuing her second master's degree – a Master of Science in Organizational Dynamics at the University of Pennsylvania, where she is concentrating on leadership and organizational coaching.

Caroline is a CERTIFIED FINANCIAL PLANNER® professional, and has also earned the Chartered Retirement Planning Counselor™ designation and the Chartered Retirement Planning Specialist™ designation. She holds the Series 7 and Series 66 FINRA registrations.

But the most important thing she's learned isn't in a textbook. It's that real results happen when you really listen, cut through the noise, and understand what a

client truly needs. Clients trust Caroline because she gets to the core of what they really want and helps them build a plan to get there. And she listens with the same intent as she does everything else.

### Fishtown, Philadelphia

Caroline and her business partner established the tenth office of The Princeton Group on Frankford Avenue, the main commercial street in Philadelphia's Fishtown neighborhood, with a mission of making wealth management more transparent, accessible, and deeply human.

Caroline is also a fierce advocate for her community as the Co-Founder of Fishtown Connect and a Board Member of the Fishtown Kensington Business Improvement District (BID). In 2024, she was honored as a Women of Influence Rising Star by the Philadelphia Business Journal.

### Outside the Office

Caroline resides in Fishtown with her fiancé and their two cats, Peaches and Charlene. When she's not building financial legacies or leading community change, Caroline's still in motion. As a classically trained pianist, avid world traveler, and marathon runner, you may find her on stage, on a starting line, or in an unfamiliar city across the globe. Whatever she's doing, count on this: she's giving it everything she's got.

CFP Board owns the marks CFP® and CERTIFIED FINANCIAL PLANNER® in the US.

The 2024 Women of Influence Rising Star by the Philadelphia Business Journal was bestowed by the Philadelphia Business Journal as a result exclusively based on community efforts, unrelated to the business of the firm.

## ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.