

Caroline Jones, CFP® CRPC™ CRPS™

Vice President, Financial Advisor



Contact Caroline Jones

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Caroline has accomplished more than most will in a lifetime: Authoring four children's books, presenting a TEDx Talk—even serving as the inaugural Miss Pennsylvania Volunteer.

She's also already found her dream career: Helping people find financial comfort. And Caroline's in it for the long haul to help individuals, families, businesses, and nonprofits achieve that goal for generations to come.

She considers herself gritty, never afraid to put in the work, no matter how long it takes. Caroline thinks in terms of decades, not months or years. Her roadmap for building client wealth is pages long, not a paragraph.

Live and Learn Vibrantly

The first thing clients notice about Caroline is her endless energy. She throws this same passion into all she does, including her education.

Caroline graduated Summa Cum Laude from King's College with a Bachelor of Science in Business Administration—with a double major in Management and Marketing and a minor in Leadership Studies. She also earned a Master of Science in Personal Financial Planning from the College for Financial Planning. Caroline 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® certificant, administered by the CFP® Board of Standards, Inc. Caroline holds the Series 7 and Series 66 FINRA securities registrations, as well as the PA Life and Health Insurance Licenses. She also earned the Chartered Retirement Planning Counselor™

designation and the Chartered Retirement Planning Specialist™ designation from the College for Financial Planning.

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

Caroline is active in the Fishtown, Philadelphia community as the Co-Founder of Fishtown Connect and a Board Member of the Fishtown Kensington Business Improvement District (BID). She was named a 2024 Women of Influence Rising Star honoree by the Philadelphia Business Journal.

Outside the Office

Caroline is a stranger to sleep. At this very moment, she may be performing as a classically trained pianist, training for her next marathon, or writing another book... quite possibly all at the same time.

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

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