



**Timothy E. Sallade, CFA, CFP®**  
**Vice President, Securities Research**  
**Account Executive**

**John G. Ullman & Associates, Inc.**  
**51 East Market Street**  
**Corning, New York 14830**  
**Phone (800) 936-3785**  
**Fax (607) 936-8361**  
**salladet@jgua.com**

*Whether identifying an under-valued investment, determining future market movements or rebalancing a client portfolio, Tim is passionate about the financial markets. An all season athlete and active father of two, Tim enjoys the challenges and rewards of helping clients and their families reach their financial goals.*

## **Credentials**

- Chartered Financial Analyst
- Certified Financial Planner®
- Cornell University,  
Johnson School MBA with  
Distinction, Finance
- University of Vermont,  
BS Mechanical Engineering

## **Community Service**

- Johnson School Dean's Leadership  
Committee

## **Background**

Tim balances the theoretical and practical. Trained in the latest investment research methods at the Johnson School, Tim combines modern theories of risk and return with tangible results for actively managed accounts. These key intellectual qualities teamed with his warm friendly style make him a highly valued member of the Ullman team. Tim started with John G. Ullman & Associates, Inc. in 2002, immediately lending his expertise in securities research.

## **Areas of Expertise**

- Portfolio Management
- Executive Compensation & Benefits
- Equity and  
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