



JOHN G. ULLMAN & ASSOCIATES, INC.

COMPREHENSIVE FINANCIAL MANAGEMENT SERVICES

Administrative Assistant

John G. Ullman & Associates, Inc. is seeking an Administrative Assistant to join our Firm. This position is an essential position in our company, and will play a significant role in the company's strategic plans to grow and expand the business.

The Role

Based in our Corning Office, this new position will focus on administrative assistant support for a team of Financial Advisors. Responsibilities and activities will include, but are not limited to, maintenance of records and file management system, calendar management and travel for Advisors, client report generation and distribution, and assisting Advisors with special projects as requested.

Primary Duties

- Manage Advisor and Client Files: develop and maintain electronic and paper file protocols, keeping client data current in computer systems
- Produce and prepare reports for client meetings, mailings, and other Advisor requirements
- Travel and Expense reports for Advisors
- Assist with client correspondence and meetings (client mailings, phone calls, faxes & emails)
- Create, edit, and/or update spreadsheets and other financial planning documents
- Provide clerical assistance in preparation of tax return
- Assist with reconciliation of client bank accounts and process bills for Trusts
- Retrieve and sort Advisor mail and third-party client statements
- Work closely with Account Coordinators to assist with brokerage paperwork, transactions and communications
- Gather and organize for client presentation information related to investment valuations, insurance quotes, banking services and other financial service products, as needed
- Assist in preparation of marketing presentations

Report to

Financial Advisor Team / Designated Financial Advisor within the team

Equipment, Software and Materials used

Microsoft Office Suite Applications (Word, Excel, PowerPoint, Access, Outlook), Tax Planning Software, Financial Planning Software and Client Relationship Management Software.

Qualifications

- Associates Degree in Business or Related Field preferred
- Previous client service experience preferred
- Strong Organizational and interpersonal skills - close attention to detail, strong on self-directed follow up, a sense of urgency, a great deal of diplomacy, ability to multi-task effectively and calmly, high level of efficiency
- Professionalism in all facets of the job is a must along with providing exceptional client service
- Ability to work directly with both internal and external partners providing support, advice and assistance in the management of clients' accounts

Perks & Benefits

Company sponsored benefits include Dental and Health Insurance with access to a Health Savings Account, Life Insurance, 401K, SEP-IRA, Paid Holidays, Vacation and Sick Days and access to the firm's Portfolio Management, Financial Planning, and Income Tax Services for you and your family.

About Us

John G. Ullman & Associates is a different kind of Wealth Management Company. Our “one firm” model provides high net worth individuals and families a single place to turn for all aspects of their financial lives, including financial planning, wealth management, and “special projects” catered to their unique needs. Our relationships with our clients are long-standing, often spanning decades and multiple generations. Our headquarters is in Corning, New York, in the beautiful Finger Lakes Region, with a second office in Rhinebeck, in the Hudson Valley region of New York.

To Apply

If you are interested in applying please e-mail a letter of interest and resume to Scott Schoonover at schoonovers@jgua.com . Please indicate you are applying for the “Administrative Assistant” position and use reference code JGUA-AAJGU