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JOHN G. ULLMAN & ASSOCIATES, INC.

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COMPREHENSIVE FINANCIAL MANAGEMENT SERVICES

### **Executive Assistant to the President**

John G. Ullman & Associates, Inc. is seeking an Executive Assistant to the President 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.

Working from the Corning Office, the focus of this position includes executive administrative assistant responsibilities/activities for the President, management and leadership responsibilities for the Administrative Support Team, and support of the Company's Investment Committee.

#### **The Role:**

Project Management – initially the successful candidate will serve as a Project Manager. Working in collaboration with the President, the Project Manager will review the requirements for each project and develop a project plan to include the scope of each project, resources needed, the deliverables, the timelines to complete the project, as well as checkpoints for reporting the status of each project to the President and all stakeholders.

Executive Assistant to the President – the successful candidate will train with the current Executive Assistant to the President to learn how the role supports the needs of the President, the Firm, and other stakeholders internal and external to the organization.

Responsibilities will include working in collaboration with the President to administer his schedule and calendar; monitor and facilitate work assignments, information distribution, and communications on behalf of the President; prepare Board of Directors, Shareholders and Client materials and presentations; track the activities of the President's client service group and schedule client portfolio reviews; prepare letters and correspondences on behalf of the President, and with input from senior advisors edit the President's draft of the quarterly client report letter and finalize for printing.

In this role, the successful candidate will also manage and provide leadership to the Administrative Support Team, including staffing, training, and performance reviews; forecast, develop and manage the department's operating budget; develop, coordinate, and monitor the work schedules for the administrative team/receptionist team to ensure there is appropriate coverage to meet the firm's business needs; and develop and implement guidelines for the appearance and maintenance of the reception area and conference rooms to ensure there is a professional appearance; and coordinate all social functions for the Company.

Work in collaboration with the members of the Investment Committee to meet the investment management needs of the Company; attend weekly Investment Committee meetings serving as the Record Keeper and Records Administrator; update the regular buy/sell lists, monitoring new accounts/large capital additions lists; prepare and distribute corporate stock certificates; maintain log of checks and wire transfers from the brokers for distribution to the clients; and maintain a daily Funds Received Log of checks received to ensure the firm is in compliance with the SEC.

#### **Qualifications**

Associates Degree or the equivalent in training and experience is required; a bachelor's degree would be preferred. 5-7 years of experience in an office setting, working in support of middle and/or upper management; prior experience working in financial services or a comparable industry would be helpful, but is not necessary; strong commitment to Values, Ethics and Integrity at the highest levels; Experience working with extremely sensitive and personal information; demonstrated the ability to handle and maintain confidential information in an appropriate manner; Must be detail oriented and have strong organizational skills; Demonstrated ability to work

with and provide high-level administrative and operational support to management; Must be proactive and have demonstrated the ability to identify opportunities to take proactive action and the willingness to make decisions and exercise the discretion to act independently; must have effective verbal and written communication skills; must have strong interpersonal skills and the confidence to serve as the first point of contact for the office/department; demonstrated ability to work in a team environment, and the willingness to communicate openly and honestly with members of management, including making recommendations when there are issues and breakdowns in communication; must have experience working with social media; and be proficient in Word, Excel, PowerPoint, and Publisher.

#### Perks & Benefits

Ability to have long-lasting and visible impact on clients' lives; opportunity to be a part of the firm as we grow and expand to meet the current and future needs of our clients; work for an organization that is strongly committed to ethics and values, offers a warm and welcoming environment, is flexible, and is supportive of training, development, and continuing education; work with a group of talented and very experienced CFP designated Financial Advisors, with strong professional networks; comprehensive dental and health care benefits, life insurance, 401K, SEP-IRA; access to all JGUA portfolio management, financial planning, and income tax services for you and your family; regular company outings; and Community Involvement

#### 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](mailto:schoonovers@jgua.com) . Please indicate you are applying for the "Executive Assistant to the President" position and use reference code JGUA-Exec Asst