



JOHN G. ULLMAN & ASSOCIATES, INC.

COMPREHENSIVE FINANCIAL MANAGEMENT SERVICES

Director of Business Development

For 40 years, John G. Ullman & Associates (JGUA) has helped clients plan for a lifetime of financial security, creating highly customized financial plans to manage, grow, and protect the wealth of its clients. Headquartered in Corning, NY, JGUA is searching for an experienced individual to manage the return on investment for all business development activities. This individual will support the firm's strategic goals and objectives through leading the strategies of specific business development goals. With a commitment to Extraordinary Standards of Ethics and Values, the Director of Business Development will be an integral part of the growth of JGUA for years to come.

Primary Responsibilities:

Responsible for the strategic and functional management of the all business development activities of the Firm. The Director will be responsible for planning, coordinating, and the execution of a comprehensive business development plan designed to meet the Firm's goals and objectives focused on client acquisition and revenue growth.

Working in conjunction with the President, Advisors and the Marketing team, the Director will develop business development programs and the techniques needed to support new business development, including identifying and developing market segmentations, channels and partnerships with Centers of Influence.

The Director will be responsible for generating leads using a relationship-based approach that will involve developing ongoing, meaningful relationships with external business partners, as well as current and prospective clients, to promote the Firm's competitive position as a leader in the Industry, the value proposition provided by our services and capabilities, and the strong commitment to our values and ethics. The Director will work in conjunction with the President, Advisors and the Marketing team to convert leads into new client accounts.

Specific Responsibilities include but are not limited to:

Strategic Planning

- Develop a comprehensive strategic business development plan designed to strategically position the Firm as a leader in the financial services industry.
- Competitively position the Firm to acquire new clients from a range of market segments that align to the new business development, account segmentation and revenue growth objectives of the Firm.

Operational Planning

- Establish annual and monthly business development objectives in coordination with the Firm's new business development and revenue growth plans.
- Develop an Annual Business Development Plan and monthly implementation plans.

Business Development Programs

- Create awareness and emphasize the Firm's competitive position as a leader in the Industry, the value proposition provides by our services and capabilities, and the strong commitment to our values and ethics.
- Train staff to engage in business development activities and implement a range of business development tactics and techniques necessary to convert leads into client acquisitions.
- In conjunction with our Branding and Marketing Manager, identify opportunities and implementation techniques to expand into non-traditional channels; to include Partnerships with Centers of Influence, Direct Mail and E-mail campaigns, Social Media, Website and Digital Channels, Industry involvement in events and conferences, advertising and public relations campaigns and Business Acquisitions and Mergers.

Market Development

- Develop a Market Segmentation Plan, to reach prospective clients at each of the account segmentation levels.
- Identify specific opportunities to create outreach and awareness of the Firm's services and abilities, as a leader in the Financial Management industry.
- Identify, build, and maintain relationships and networks to establish connections to a range of Centers of Influence and individual partnerships to support the Firm's Referral strategies.
- Represent the Firm at Industry and Community activities and events, to include trade shows, industry conferences, professional association activities, and career fairs.

Monitoring and Reporting

- Develop a system to enter, track and monitor all business development activities and prospective client interactions.
- Develop processes and procedures to document and report information regarding business development activities and prospect interactions to support the tracking, monitoring and analysis necessary to evaluate the progress and effectiveness of the Firm's marketing and business development activities.

Professional Training and Development

- Remain current as a Business Development Professional by participating in Professional Association Events and Activities, Trade Shows and Fairs, and attending Conferences
- Maintain skills and job knowledge at an advanced level by participating in educational opportunities, reading professional publications, maintaining personal networks, and participating in educational programs offered by professional organizations.

Required Qualifications:

- Bachelor's Degree from an accredited college or university, MBA preferred.
- Minimum 7 years of experience in business development and leadership, preferably in financial services/service industry. CFP, CFA beneficial.
- Proven track-record of success in developing and executing integrated business development and marketing campaigns and driving business development and revenue growth via lead generation.

- Creative strategic thinker and tactical implementer; innovative self-starter; resourceful and flexible; able to adjust to changing priorities; analytical with the ability to offer new ideas that drive and improve results.
- Superior interpersonal, communication, and negotiation skills; enthusiastic and self-motivated; able to motivate others to achieve results
- Strong written skills; demonstrated ability to write compelling and persuasive materials that drive difference making results.
- Experience leading and mentoring a team as well as serving in a senior leadership capacity.
- Steadfast ethics and values.

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 Director of Business Development position and use reference code JGUA-DBD