

Field Sales Professional – Cortland & Ithaca, NY

John G. Ullman & Associates, Inc. has an exciting opportunity for experienced Field Sales Professionals to join our firm.

If you are interested in working remotely from your home in the Cortland & Ithaca area, and you enjoy networking and building relationships, this is an opportunity to play a significant role in the firm's strategic plan to grow and expand our business.

The Role:

You will report to and work in collaboration with the President of the firm and our Financial Advisors. This is a Field Sales position focused on generating leads using a relationship-based approach that will involve establishing networks and developing meaningful relationships with referral sources and prospective clients. The Field Sales Professional will develop strategies to attract and acquire groups and/or individual prospective clients and develop relationship management initiatives in partnership with the President and the Financial Advisors to convert prospective clients into new business for the firm.

Qualifications:

- Successful candidates must have a Bachelor's Degree, a graduate or advanced degree would be preferred; with 5-10 years of applicable experience in field sales; preferably in the financial services or a comparable industry.
- We are open to considering a mid-career or second career candidate who may have previously served as a consultant who is interested in re-entering the private sector. We also will consider candidates who want to make a career change and are interested in transitioning into the financial services industry, and /or candidates who are interested in re-entering the workforce for a second career.
- Candidates must be self-driven, with a high level of intensity, and be motivated to drive business activities to meet performance metrics and have a successful track-record of meeting and/or exceeding their new business development goals and objectives on a consistent basis.
- Must have the ability to leverage current relationships and networks, as well as establishing and managing new relationships and networks with high net worth individuals that can be converted into new business opportunities.
- Candidates must be highly organized, have strong time management skills, and pay close attention to details.
- Must have strong interpersonal skills, and have demonstrated the ability to effectively interact with a wide-range of people.
- Must have experience working with desktop applications (Word, Excel, and PowerPoint); the Outlook application, including scheduling; informational and database systems; and the ability to work with a CRM system.

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, Company Holidays, Floating Holidays, Vacation Time and Sick Time.
- Access to all JGUA portfolio management, financial planning, and income tax services for you and your family
- Regular company outings
- 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 Big Flats, New York and our office in Corning, New York, are located in the beautiful Finger Lakes region. Our third office in Rhinebeck, is located 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 the Human Resources Department at HR@jgua.com . Please indicate you are applying for the Field Sales Professional position and use reference code JGUA-Sales.