JOHN G. ULLMAN & ASSOCIATES, INC.

COMPREHENSIVE FINANCIAL MANAGEMENT SERVICES

Business Development Representative – Thruway Region

John G. Ullman & Associates, Inc. is seeking an experienced Business Development Representative with a hunter mentality who enjoys building new relationships. This 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 in the Thruway Region of Upstate New York.

Working remotely from your home office, the Business Development Representative will report to the Director of Business Development and work in conjunction with our Client Service Teams and/or a group of Financial Advisors, as well as with the Marketing Team to execute a comprehensive business development plan designed to meet individual goals and objectives. The focus of this role is on client acquisition and revenue growth with affluent and High Net Worth Individuals (HNWIs) located in and around the Thruway Region of Upstate New York.

The Business Development Representative will generate leads using a relationship-based approach that will involve developing meaningful relationships with external business partners who can act as multipliers; as well as prospective clients. This success oriented, goal-busting individual will promote and be aided in marketing 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 Ethics and Values.

The Business Development Representative will develop strategies that create opportunities to attract and acquire groups of prospective clients and/or individual prospective clients; make telephone calls and arrange in-person visits to conduct presentations to prospective clients to generate leads; and coordinate with the Director of Business Development, our Client Service Teams and/or a group of Financial Advisors to successfully convert business development initiatives into new business.

This role presents a tremendous growth opportunity for a person with 3+ years of experience in financial services or consulting, or a more experienced marketing or business development professional with interest in transitioning into financial services.

Successful candidates must have a Bachelor's Degree, preferably with a concentration in Marketing or Business Administration, 3-5 or more years of relevant and successful experience in business development with affluent and HNWIs is required; experience in financial business development or marketing is preferred; 5-7 years of successful and relevant financial business development and marketing experience, focused on business development and lead generation activities in the financial management/services industry is strongly preferred. Knowledge and experience associated with the Series 6 & 63 licenses will be beneficial, as will the CFP, CFA, CFS, CIC and/or CIMA certifications.

Candidates must be highly organized with strong attention to detail; demonstrated ability to maintain detailed and accurate records in a fast paced and changing environment; meet and/or exceed established deadlines. Superior interpersonal, communication, and negotiation skills; enthusiastic and self-motivated; able to motivate others to achieve results. Strong Presentation Skills; demonstrated ability to effectively and persuasively address internal and external constituents on an individual basis and in a group setting. Must be able to effectively use a variety of informational systems, applications, and desktop software (MS Word, Excel, and PowerPoint); must be able to develop and generate reports; prepare presentation and slide shows. Experience working with systems and applications used in the financial services industry would be beneficial. Must be able to work long hours, which could include evenings and weekends. Must have a valid Driver's License. Must be willing and able to meet with prospective clients daily and travel 25% or more to support our business development needs.

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 Business Development, and Branding & Marketing professionals as well as with a group of very experienced CFP designated Financial Advisors; all 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

- 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, Director of Human Resources at schoonovers@jgua.com . Please indicate you are applying for the Business Development Representative – Thruway Region position and use reference code JGUA-BDR (Thruway)