



John G. Ullman & Associates, Inc.

Comprehensive Wealth Management

Part-Time Administrative Assistant (Big Flats/Corning, NY)

John G. Ullman & Associates, Inc. is seeking an Administrative Assistant to join our Corporate Services Team on a part-time basis. This will be scheduled to work 25-hours per week.

The Role:

The Administrative Assistant will be part of a three person team which collectively provides receptionist and administrative support for the Corporation. Working from both the Big Flats and Corning Offices, the Administrative Assistant will greet visitors, clients and staff; answer, announce, and transfer incoming calls and/or take and deliver messages to appropriate parties; keep conference rooms and the reception areas neat and tidy; and maintain the beverage areas. In addition to the receptionist duties, the Administrative Assistant will receive mail and deliveries; prepare mail and packages for pick-up; coordinate and schedule conference rooms for client meetings; prepare labels and envelopes for special mailings; stock forms and supplies; update the firm's intranet calendar; enter information into the firm's informational database systems; run special reports; prepare letters and documents for clients as requested; provide Notary services; and provide support in preparing information used during the tax preparation process.

Qualifications

- Associates Degree or the equivalent in training and experience is required.
- 1-3 years of office experience is required.
- Must be willing and able to complete the NYS Notary Commission Process; NYS Commissioned Notary is preferred.
- Strong communication skills and the ability to interact effectively on the telephone as well as in person.
- Experience working with desktop applications (Word and Excel); advanced skills in Excel is preferred.
- Experience working with filing, database, and informational systems.
- Experience working with Outlook and the ability to use the application for scheduling rooms and appointments.
- Highly organized and have strong attention to detail.
- Ability to multi-task and meet deadlines.
- Excellent follow up skills.
- Professionalism in all facets of the job.
- Be able to work directly with team members and other departments in the Corporation to provide support, advice and assistance.

Perks & Benefits

- 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.
- Ability to have long-lasting and visible impact on clients' lives
- Work with a group of very talented and experienced colleagues who are dedicated to meeting the needs of our clients.
- Opportunity to be a part of the firm as we grow and expand to meet the current and future needs of our clients.
- Benefits include 401K, SEP-IRA, Company Holidays, Floating Holidays, Vacation Days and Sick Days.
- 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 “Administrative Assistant” position and use reference code JGUA-AA.