Administrative Assistant-Wealth Management Team

John G. Ullman & Associates, Inc. is seeking an Administrative Assistant to join our firm. This is an essential position in our company, and will play an important role in supporting the administrative needs of one of the firm's Wealth Management Teams.

The Wealth Management Team is looking for a highly motivated and proactive individual to join their team. The Team works in a fast paced, high expectation environment, but they have fun with each other as well. They celebrate success and are looking to grow.

The ideal individual will learn to work in a client facing role with the opportunity for personal growth. The team will provide hands on training for you to be successful. They value things like hard-work, follow-up, over-communication, pro-activeness, accuracy, willingness to learn financial planning concepts, and ability to build relationships within the team and with clients.

In your role as Administrative Assistant, you will provide support to the team and their clients. This can include things like

- serving as a point of contact for clients
- maintaining records
- scheduling
- report generation
- preparing correspondences and information packets
- supporting all communications with clients
- serving as the team's liaison to other departments within the firm
- supporting the tax preparation process
- assisting the members of the team with special projects.

Successful candidates must have the following qualifications.

- Associates Degree, preferably in business or a related field, or the equivalent in training and experience.
- 3 – 5 years of client or customer service experience.
- Must be able to demonstrate your commitment to the highest values, ethics and integrity is aligned with the firm's expectations.
- Must be able to pay close attention to detail, follow-up on actions, have a sense of urgency, be able to exercise a great deal of diplomacy, and the ability to handle stress in a positive and productive manner.
- Professionalism in all facets of the job is a must, along with providing exceptional client service.
- Must be able to work directly with team members, other departments, and outside parties who provide support, advice, and assistance in the management of the client's relationship with the firm.
- Must have strong technical skills, and the ability to work with desktop applications, including Microsoft Office Suite (i.e. Word, Excel, PowerPoint, and Outlook) at an advanced level.
- Must be able to demonstrate that you have the ability to learn, retain, and can use new technology, including integrated informational systems.
- Must have strong interpersonal and communication skills, both verbal and written.

John G. Ullman & Associates, Inc. is a wealth management firm committed to bringing human connection, attention to detail and trust to every aspect of financial planning. For over 40 years, we have helped clients plan for a lifetime of financial security, creating highly customized financial plans to manage, grow, and protect our client's wealth. Our team has grown to include a diverse group of expert financial planners, tax professionals, investment researchers, legal professionals and support staff in three separate New York State Locations; including our headquarters located in Big Flats, NY; and branch offices located in Corning, NY and Rhinebeck, NY.

If the above description intrigues you, and you think you have what it takes, please submit your letter of interest and resume. We look forward to hearing from you!

To Apply: please e-mail a letter of interest and resume to Scott Schoonover, Director of Human Resources at **HR@jgua.com**. Please use Reference # JGUA-AAW