John G. Ullman & Associates, Inc.
COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978

Sales Representative

Are you an experienced sales professional that enjoys meeting new people, establishing meaningful relationships, being able to promote the company's commitment to ethics and values at the highest levels, and having the opportunity to show people how our services and support can help them achieve their goals? If so, we are interested in exploring the possibilities of having you join our dynamic relationship development team!

The Sales Representative 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.

This position is designed to be flexible with regards to your work location. We have an on-site work station available for the days you need to be in the office. There also may be days where you have the option to work remotely from your home office. You will work in collaboration with the Executive Vice President/Chief Operating Officer to determine where you should work on any given day.

The Sales Representative will focus on generating leads using a relationship-based approach that will involve developing strategies to identify, attract, and acquire groups and/or individual prospective clients; developing meaningful relationships with referral sources and prospective clients; 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 firm will provide prospect lists that the Sales Representative will be responsible for contacting to develop meaningful relationships with prospective clients. In addition to referrals from the firm, the Sales Representative will be responsible for establishing their own networks and developing meaningful relationships with referral sources and prospective clients.

Working in partnership with the Executive Vice President/Chief Operating Officer and the Financial Advisors, the Sales Representative will develop relationship management initiatives to convert prospective clients into new business for the firm.

Qualifications:

- Must have strong values and be committed to the highest level of ethics and integrity.
- 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 candidates that have a lower level of education if they have the equivalent in training and experience.
- 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 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.

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 Sales Representative position and use reference code JGUA-SRep2.