



## Administrative Assistant-Receptionist

John G. Ullman & Associates, Inc. is seeking an Administrative Assistant-Receptionist to join our firm. This is an essential position in our company, and will play an important role in processing checks received, as well as supporting the administrative and reception needs of the firm.

This is a full-time position that will be assigned to work in the firm's headquarters, located in Horseheads, NY.

In your role as the Receptionist, you will be responsible for the following

- Greeting all visitors, clients and staff.
- Coordinating booking of conference rooms.
- Keeping conference rooms and reception area neat and tidy for use by clients and staff (tables clean, chairs in, shades adjusted, plants watered, etc.).
- Maintaining beverage area: preparing coffee and keeping supply of water in the refrigerator.
- Answering all incoming telephone lines, announcing calls as needed, transferring calls to appropriate parties and/or taking messages.

In your role as the Administrative Assistant, you will be responsible for the following

- Inputting UPS shippers into the system for pick up by UPS.
- Data Entry, new client paperwork, updating the CRM.
- Inputting client updates such as address, phone, etc.
- Updating the daily calendar on the intranet.
- Updating employee information on the Intranet.
- Scheduling appointments.
- Assisting other departments with preparations and mailings as needed.
- Assisting the tax department with processing and mailings, as needed.
- Updating additional reports list, assembling the quarterly reports, letters and envelopes for "extra" reports.
- Perform closing procedures upon leaving at night.
- Provide Notary services (training can be provided).

In your role as the Check Processor, you will be responsible for the following

- Logging all incoming checks.
- Copying checks onto a Disbursement Sheet.
- Scanning Disbursement Sheets into a shared drive.
- Routing checks to the appropriate department and/or building location.
- Review the Transmittal Sheets prepared by the firm's records department to ensure the information entered is complete and accurate.
- Prepare information packages to be picked up by the Carrier each day.
- Send a copy of the daily check log to the President for review.
- Place the original copy of the daily check log in the appropriate binder.

Successful candidates must have the following qualifications.

- Associate's Degree or equivalent in training and experience is required. A Bachelor's Degree is preferred.
- 2-4 years of administrative assistant experience is required, prior experience as a receptionist and/or cashier would be preferred.
- 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 demonstrate your commitment and the ability to adhere to the firm's strict confidentiality policy.
- Must be organized and pay close attention to detail, follow-up on actions, and demonstrate the ability to handle tight deadlines 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, and service to 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). Experience with scheduling and information systems is preferred.
- Must have strong interpersonal and communication skills and the ability to interact effectively on the telephone as well as in person.
- Must be willing and able to complete the NYS Notary Commission Process; NYS Commissioned Notary is preferred.

**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.

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