



Marketing Associate

John G. Ullman & Associates, Inc. is seeking Marketing Associate to join our firm. This is an essential position in our firm and that will play a significant role in our strategic plans.

This is an exciting time to join our firm as we continue to grow and expand. Whether you are just getting started with your marketing career and/or you are looking for the next opportunity in your career, we have an exciting opportunity for you to utilize your education, knowledge, and experience to assist the on-site marketing team develop and execute the firm's overall marketing plan.

In this role, the Marketing Associate will use their eagerness to learn and natural enthusiasm for marketing to make a meaningful contribution to the firm's marketing initiatives to create brand awareness in support of the firm's efforts to educate current clients and attract new clients.

The Marketing Associate will be instrumental in designing, developing, executing and managing value-added content used to raise awareness of the JGUA brand among a highly targeted audience. The successful candidate will collaborate with Executive Vice President/Chief Operating Officer, the Marketing Associate II and internal subject matter experts to develop relevant pieces of content, meeting the needs of both key stakeholders and the JGUA target audience. This role requires a high level of creativity, attention to detail, flexibility, and organization.

Duties:

- **Plan and Execute Communications** – newsletters, invitations, social media, case studies, website, etc.
- **Email and Social Media Campaigns** – assist with A/B testing, budget tracking, engagement analysis.
- **Drafting and Editing** - manage short and long content, such as newsletters, email campaigns, presentations, and blog posts.
- **Marketing Collateral** – updating factsheets, presentations, brochures, and event invitations.
- **Marketing Materials** – assist in drafting brochures, presentations, etc.
- **Scheduling** – maintain project schedules and Marketing calendar.
- **Website Management** – social media marketing, content creation, email campaigns, conference preparation, PR, sales support.
- **CRM Strategies** – plan and deliver to retain clients and build our new client relationships.
- **Support Applications** – CRM database, campaign management, sales systems.
- **Editing** – audio/visual files for podcasts, webinars, video clips, etc.

Qualifications:

- Bachelors' degree in Marketing preferred.
- 1-3 years of relevant work experience.
- Previous experience in a marketing/communications role preferably in the Financial Services industry would be beneficial.

- We will consider a recent college graduate whose studies included general courses and/or advanced courses in marketing; experience as a Marketing Intern would be beneficial.
- Previous experience in developing content i.e. newsletters, websites, articles, and graphics
- Past experience managing social media platforms including LinkedIn
- Ability to multi-task and prioritize multiple requests within tight deadlines
- Successful track record in managing projects
- Ability to use initiative and work independently while also being a team player
- Personable and possess the ability to communicate with all members of staff and clients
- Experience in webinar and podcast management preferred (Adobe)

Job Description:

To view the full job description go to <https://jgua.com/marketingassociate>

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 Certified Financial Planner® position and use reference code JGUA-MA.