



## **Receptionist – Administrative Assistant (Part-time/Flex-time)**

John G. Ullman & Associates, Inc. is seeking a Receptionist-Administrative Assistant to join our firm. This is a new position in our firm that will play an important role in supporting the reception and administrative needs of the firm.

This is an exciting time to join our firm as we continue to grow and expand. You will have the opportunity to join an experienced front desk team, where you will learn to provide administrative support to many of the firm's key areas.

This is a part-time/flextime position that will be assigned to work in the firm's headquarters located in Big Flats, NY, and occasionally in our Corning, NY location.

### **Receptionist Duties:**

- Greeting all visitors, clients and staff.
- Coordinating booking of conference rooms.
- Keeping reception area neat and tidy for use by clients and staff.
- When assigned to the Corning Office, keep conference rooms 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.
- Provide coverage when other members of the front desk team are out of the office (vacation, sick, etc.)

### **Administrative Assistant Duties:**

- 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).

### **Other Duties as Assigned:**

- As time permits, provide administrative assistance and support to other departments to meet the firm's business needs.

**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 administrative assistant would be preferred.
- Must be able to demonstrate that 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 essential, and you must be committed to 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.

**Job Description:**

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

**About Us:**

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-Reception.