



Senior Corporate Accountant

John G. Ullman & Associates, Inc. has an exciting opportunity for an experienced accounting professional with leadership skills to join our firm as a Senior Corporate Accountant. This is a new position being created as part of the firm's strategic plans for growth and expansion. This position is also be part of the succession planning for the department, which may include the Controller position. For a highly motivated and skilled candidate there is excellent potential for advancement.

The Senior Corporate Accountant will work with the Vice President/Controller to provide the highest level of service and support for the Board, Shareholders, Clients and Employees. The Senior Corporate Accountant will work in conjunction with the Vice President/Controller to learn all of the functions of the department and will supervise the staff assigned to corporate accounting and purchasing. Specific responsibilities assigned will include coordinating the budgeting process; assisting with corporate tax reporting; managing retirement plan reporting; coordinating the year-end audit; and developing documentation for corporate accounting and purchasing processes.

The Senior Corporate Accountant will be assigned to work in the firm's Corning, NY Office.

Duties and Responsibilities:

- **Supervision** – monitor and guide staff activities, documentation of processes, and develop training plans.
- **Budgeting** – produce, monitor, and report on Expense and Capital Budgets.
- **Tax Reporting** – assist with the firm's Quarterly & Annual Tax Reporting.
- **Retirement Plan** – manage the reporting for the firm's 401K Retirement Plan.
- **Audit** – coordinate the firm's year-end audit.
- **Processes and Procedures** – coordinate, review, audit, and analyze the accounting and purchasing procedures to ensure the department is functioning effectively.
- **Cross Training** – learn all of the department's accounting and purchasing functions to develop the ability to serve as a back-up, as needed.
- **Other Responsibilities** – work on special projects; assist with the SEP-IRA, etc.

Qualifications:

- BA/BS in Accounting or related field; advanced degree preferred.
- CPA desirable
- 8-10 years of experience in accounting
- Previous experience managing an accounting department and supervising staff is preferred.
- Strong organizational skills
- Strong time management skills and demonstrated ability to meet strict deadlines
- Must be able to pay close attention to detail.
- Demonstrated ability to work with personal and sensitive information, in a secured information environment where you were required to maintain a high-level of confidentiality.
- Must have strong math skills and have the ability to complete complex calculations manually using multiple information sources.

- Must have technical skills and demonstrated the ability to use desktop applications (Microsoft Office Suite – Word, Excel and Outlook)
- Experience working in an environment that requires the use of financial/accounting systems and manual accounting procedures
- Analytical skills and the ability to audit information and identify the need for corrective action to be taken.
- Demonstrated ability to establish and maintain effective working relationships with management and employees assigned to other departments.
- Experience working with clients and client file information is preferred.
- Demonstrated ability to learn quickly and apply knowledge on a consistent manner.

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.

Job Description:

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

To Apply:

If you are interested in applying, please e-mail a letter of interest and resume to Scott Schoonover, Director of Human Resources at HR@jgua.com. Please use Reference # JGUA-ACCT.