



Relationship Developer – Charlotte, NC Remote Position

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

This is an exciting time to join our firm as we continue to grow. You will have the opportunity to join a relationship development team of highly trained and experienced relationship developers located in several different areas in New York and Pennsylvania. As part of our growth, we plan to add several more relationship developers to our firm to work in support of the firm's business development goals.

You do not need to relocate to be considered for this position. These positions are designed to work remotely. We expect our Relationship Developers to work a majority of the time from their home office or in the field, so we are willing to consider candidates with the right blend of knowledge and experience, regardless of where they live. We have on-site workstations available for the days Relationship Developers need/want to be in the office.

The Relationship Developer 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.

Role:

- **Relationship Development Plans:** develop strategies and action plans customized for each prospective client to convert relationship initiatives into new business.
- **Marketing Programs:** develop plans to utilize and leverage marketing and communication materials to create awareness of the firm's competitive position, the value proposition, and a strong commitment to Ethics and Values.
- **Business Relationships:** establish, develop, maintain with business partners and prospects to generate new business. Foster a network of referrals
- **Relationship Development Activities:** create opportunities to attract and acquire groups and/or individual prospects.
 - **Personal Networks:** establish their own networks and develop meaningful relationships with referral sources and prospects.
 - **Marketing Initiatives:** follow up with prospects who have contacted the firm to express interest in more information regarding our services.
 - **Firm Referrals:** contact prospects provided by the firm to develop meaningful relationships.
- **Referrals to Client Services:** coordinate with the Director of Relationship Development and the Financial Advisors to share and transition prospect leads that are positioned to be converted to new business.

Qualifications:

- Having strong values and being committed to the highest level of ethics and integrity is essential.
- Bachelor's Degree; we are open to considering candidates that have a lower level of education if they have the equivalent in training and experience.
- Experience in field sales working with affluent people; experience in the financial services or a comparable industry is preferred.
- We are open to considering a mid-career or second career candidate who may have previously served as a consultant who is interested in re-entering the private sector. We also will consider candidates who want to make a career change and are interested in transitioning into the financial services industry, and /or candidates who are interested in re-entering the workforce for a second career.
- The ability to be self-driven, with a high level of intensity, and the motivation to drive business activities to meet performance metrics is preferred.
- 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 is preferred.
- Being highly organized, with strong time management skills, and the ability to pay close attention to details will be beneficial.
- Strong interpersonal skills and the ability to effectively interact with a wide-range of affluent people is preferred.
- Experience working with desktop applications (Word, Excel, and PowerPoint); the Outlook email system, including scheduling; informational and database systems; and the ability to work with a CRM system will be beneficial.

Projected Hiring Range:

Annualized Salary \$55,341.00 - \$80,000.00

Job Description:

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

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 Relationship Developer position and use reference code DOL-RelDev.