Relationship Developer

This is an essential position in our company, and will play a significant role in the company's strategic plans to grow and expand the business.

This position is designed to be flexible with regards to your work location. We have an on-site work station available for the days you need to be in the office. There also may be days where you have the option to work remotely from your home office. You will work in collaboration with the Executive Vice President/Chief Operating Officer to determine where you should work on any given day.

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.

The firm will provide prospect lists that the Relationship Developer will be responsible for contacting to develop meaningful relationships with prospective clients. In addition to referrals from the firm, the Relationship Developer will be responsible for establishing their own networks and developing meaningful relationships with referral sources and prospective clients.

Working in partnership with the Executive Vice President/Chief Operating Officer and the Financial Advisors, the Relationship Developer will develop relationship management initiatives to convert prospective clients into new business for the firm.

The Role:

The Relationship Developer will:

Relationship Development and Marketing Programs

- Develop strategies and action plans to implement specific marketing and relationship development plans customized for each prospective client to enhance the firm's ability to convert relationship initiatives into new business.

- Develop plans to utilize and leverage the Firm's marketing and communication materials, to create awareness and emphasize 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.

- Develop and implement marketing and relationship development programs and the relationship development techniques that will effectively support the overall new business development goals for a Client Service Team and/or the Firm.

Market Development

- Establish, develop and maintain business relationships with current and prospective business partners and prospective clients to generate new business for a Client Service Team and/or the Firm.

- Promote the Firm's brand to individual business partners, and prospective clients.

- Build and foster a network of referrals to create new opportunities for relationship development and revenue growth.

- Identify opportunities to conduct information-only presentations, such as seminars, conference presentations, and other efforts designed to create awareness about 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.

- Perform professional presentations to prospective business partners and/or individual business partners, to create awareness about 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.

<u>Relationship Development Activities</u>

- Develop relationship development strategies that create opportunities to attract and acquire groups of prospective clients and/or individual prospective clients.

    - The firm will provide prospect lists that the Relationship Developer will be responsible for contacting to develop meaningful relationships with prospective clients.

    - The firm will refer prospects that respond to marketing initiatives. The Relationship Developer will be responsible for following up in a timely manner to provide additional information and to develop meaningful relationships with prospective clients.

    - In addition to referrals from the firm, the Relationship Developer will be responsible for establishing their own networks and developing meaningful relationships with referral sources and prospective clients.

- Develop presentations supported by the Firm's marketing and communication materials, which are custom-designed to meet the specific needs and expectations of prospective client groups or individual prospective clients.

- Make telephone calls and make in-person visits to conduct presentations to prospective clients to generate leads.

- Coordinate relationship development activities and assignments with the Executive Vice President/Chief Operating Officer and the Firm's Financial Advisors; share prospect leads that are positioned to be converted into new business; provide detailed information including prospect biography/profile, background about the relationship, the referral source, the relationship management strategy, action steps taken, and the recommended acquisition strategy.

<u>Monitoring and Reporting</u>

- Utilize the Firm's technical resources and systems to enter, track and monitor all relationship development activities and prospective client interactions.

- Maintain accurate records, including prospect call reports, expense reimbursement forms, billing invoices, and other documentation; monitor the systems to ensure Financial Advisors are following up by entering Relationship Development and Marketing Activities into the system.

- Monitor market channeling and referral networking activities to determine how effective the Firm is generating prospect leads.

- Monitor and track the status of the acquisition strategies being implemented in collaboration with the Financial Advisors.

- Monitor and track the conversion rates from prospect leads to client acquisitions; identify issues and/or opportunities to enhance our processes to increase the conversion rates to meet the Firm's new business development, client acquisition, and revenue growth objectives.

- Make a front-line assessment of marketing conditions and advise the Executive Vice President/Chief Operating Officer; as well as the Marketing team of the findings.

- Build and maintain ongoing awareness of new products and services, competitor activities, and other research conducted.

- Keep the Executive Vice President/Chief Operating Officer informed by submitting activity and results reports, such as daily call reports, weekly work plans, and monthly and annual market segment/channel analyses.

- Monitor competition by gathering marketplace information on pricing and fee structures, products and services offered, customer service techniques, etc.

- Recommends changes in products, services, and policy by evaluating results and competitive developments.

Professional Training and Development

- Keeps abreast of products and services being offered throughout the industry, market conditions, competitive activities, advertising and promotional trends through reading of pertinent literature and consulting with marketing and technical service areas.

- Participated in trade shows and conventions.

- Maintains professional and technical knowledge by attending educational workshops, reviewing professional publications, establishing personal networks, and participating in professional associations and societies.

Qualifications:

- Successful candidates must have a Bachelor's Degree, a graduate or advanced degree would be preferred; with 5-10 years of applicable experience in field sales; preferably in the financial services or a comparable industry. We are open to considering candidates that have a lower level of education if they have the equivalent in training and experience.
- 5-10 years of applicable experience in field sales; preferably in the financial services or a comparable industry.
- 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.

- Candidates must be self-driven, with a high level of intensity, and be motivated to drive business activities to meet performance metrics and have a successful track-record of meeting and/or exceeding their new business development goals and objectives on a consistent basis.
- Must have 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.
- Candidates must be highly organized, have strong time management skills, and pay close attention to details.
- Must have strong interpersonal skills, and have demonstrated the ability to effectively interact with a wide-range of people.
- Must have experience working with desktop applications (Word, Excel, and PowerPoint); the Outlook application, including scheduling; informational and database systems; and the ability to work with a CRM system.

Perks & Benefits:

- Ability to have long-lasting and visible impact on clients' lives
- Opportunity to be a part of the firm as we grow and expand to meet the current and future needs of our clients.
- Work for an organization that is strongly committed to ethics and values, offers a warm and welcoming environment, is flexible, and is supportive of training, development, and continuing education.
- Work with a group of talented and very experienced CFP designated Financial Advisors, with strong professional networks.
- Comprehensive dental and health care benefits, life insurance, 401K, SEP-IRA, Company Holidays, Floating Holidays, Vacation Time and Sick Time.
- Access to all JGUA portfolio management, financial planning, and income tax services for you and your family
- Regular company outings
- Community Involvement

Projected Hiring Range:

Annualized Salary $55,341.00 - $75,000.00

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 JGUA-RelDev.