



Information Services Specialist

John G. Ullman & Associates, Inc. is seeking an Information Services Specialist to join our firm. This is an essential position in our company that will play an important role in supporting the company's strategic plans to grow and expand the business.

Role:

Working in a team environment, the Information Services Specialist will be responsible for the accuracy and quality of information, as well as the reconciliation of data within the core corporate software platforms.

The Information Services Specialist will collaborate with the members of the team to complete several important processes and reports in support of compliance as well as the services we provide to our clients. This will include working with other departments and third parties to ensure client requests are handled in a timely and accurate manner.

Qualifications:

The successful candidate must have an Associate's Degree in a related field. We also will consider candidates who have the equivalent in training and experience. We are looking for someone with 1-3 years of experience working with information and data and who is able to create reports. Must have experience working at least at an intermediate level with desktop software and applications (i.e. Word, Excel, Access, PowerPoint, Outlook).

Projected Hiring Range:

Hourly Rate \$16.00 - \$24.00

Job Description:

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

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, Rhinebeck, NY and Charlotte, NC.

To Apply:

If you are interested in applying please email a letter of interest and your resume to Stephany Achterberg at achterbergs@jgua.com. Please indicate you are applying for the Information Services Specialist position and use the reference code JGUA – IS.

Compensation Range: \$16.00 - \$24.00