

Position Title: Corporate Events Planner

Reports To: Aaron Abrahms, Principal

Firm Summary:

Winged Keel Group is an independent life insurance brokerage firm that creates and implements tax-efficient, multi-generational wealth accumulation and wealth transfer strategies for ultra-high net worth families. With offices in New York and San Francisco, the firm specializes in the structuring and administration of large blocks of Traditional Life Insurance and large portfolios of Private Placement Variable Life Insurance and Annuities.

Position Summary:

This is a fantastic opportunity to coordinate and project manage tastefully curated events from conception to completion for Winged Keel Group's clients and advisors. Annual events include small dinners 1-2x a month, three cocktail parties in NYC for approximately 50 guests, two cocktail parties in San Francisco for approximately 35 guests, eight educational panels (usually hosted over breakfast), and 2-3 small golf outings per year. This is a part-time, 20-30 hour/week position.

Essential Functions:

- Manage venue logistics: Research and identify venues, manage contract negotiations and wine and menu selections, oversee execution of entire event
- Create invitations and ensure adherence to company branding and compliance
- Track invitations and RSVPs
- Draft and send reminder emails
- Oversee budgeting of events including sponsorship outreach and tracking sponsor checks

Ideal Candidates Will Possess the Following:

- Demonstrated excellence in communications skills, including writing and proof reading
- Experience in catering, event planning or project management
- High attention to detail and high expectations for quality
- Excellent presentation
- Strong negotiation and interpersonal skills
- Ability to organize, prioritize and manage multiple tasks and requests
- Ability to set and meet deadlines
- Ability to work comfortably in a team environment
- Strong follow through
- Experience creating invitations using Indesign, Canva, or Paperless Post
- Strong proficiency in MS Outlook and Excel



WINGED KEEL GROUP®

To apply, please contact:

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