

Position Title: Accounting / Finance Intern

Reports To: Vikash Haritwal, Chief Operating Officer

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:

Seeking a diligent, conscientious, detail-oriented intern with accounting and bookkeeping experience to assist the Finance team. The ideal candidate will be able to begin interning in January 2018 and work 18-20 hours per week during the hours of 8:30am-5:30pm Monday through Friday. The intern must be able to commit to a six month internship assignment. Fantastic opportunity to learn hands on from a seasoned and talented Controller in a fast-paced, entrepreneurial, professional financial services firm.

Essential Functions:

- Enter bills in Quickbooks
- Enter data into the Commission Tracker
- Enter data into the License Tracker
- Create various reports in Excel
- Miscellaneous administrative tasks, e.g. filing, copying, scanning
- Special projects on an as needed basis

Ideal Candidates Will Possess the Following:

- Pursuing a Bachelor's degree in Accounting or Finance
- Must be able to work 20 hours per week
- Strong proficiency in Microsoft Office
- Strong proficiency in Quickbooks
- Experience in and strong understanding of accounting



WINGED KEEL GROUP®

To apply, please contact:

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