



WINGED KEEL GROUP®

CAREERS

Position Title: Client Services Intern

Office Location: New York

Position Summary:

Seeking a diligent, conscientious and detailed oriented student who can commit to a 6-month internship to support our Client Services & Reporting department starting in Summer 2019. This department focuses on delivering the highest quality, first class service to our ultra-high-net-worth clients. Offering a suite of services that range from customized reporting, premium invoicing, task management, or the preparation of client life insurance portfolio reviews, the root of this department stems from a disciplined approach towards servicing and monitoring the performance of our client portfolios.

Excellent opportunity to expand your skill set in a fast-paced, entrepreneurial environment. Must be dedicated and reliable with a strong willingness to learn and grow.

Position Responsibilities:

- Create client portfolio summaries and draft client communications
- Assist with client invoicing
- Prepare and review monthly insurance portfolio statements within strict deadlines
- Work with insurance companies to reconcile data discrepancies and facilitate changes in client portfolios
- Provide assistance with miscellaneous administrative tasks (e.g. copying, scanning, data entry)

Ideal Candidate will Possess the Following:

- Pursuing a Bachelor's degree
- Highly detailed oriented with a strong ability to organize and prioritize
- Proficiency in Microsoft Office
- Reliable and committed to a 6-month internship assignment
- Effective communication and interpersonal skills/ team player
- Proactive and takes initiative with strong follow through
- Positive, can-do attitude

To apply, please contact:

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