



WINGED KEEL GROUP®

CAREERS

Position Title: Client Services Associate

Office Location: New York

Position Summary:

Winged Keel Group's Client Services 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. The client is always the first priority, and taking a close second is the commitment to collaborating with the team to meet objectives and expectations in a timely fashion.

The Client Services Associate will not only learn about servicing the wealthiest families in the country with their insurance policies, but you will also gain an in-depth experience in developing task management and time management skills, relationship / rapport building with clients, effective communication skills, and an exceptional attention to detail. The work is intellectually stimulating and challenging, and hard work is recognized and rewarded.

Position Responsibilities:

- Prepare premium invoices, email drafts, and policy reviews. Identify errors and recommend enhancements that will contribute to an improved and excellent level of customer service
- Manage resolution of issues by analyzing facts, discerning appropriate course of actions, and discussing/planning tactical direction with colleagues
- Obtain policy values, forms and information from insurance carriers via carrier websites, phone, and fax
- Improve and create procedures to provide greater efficiency in the overall client experience
- Develop good relationships with insurance carrier contacts who we rely on to provide prompt and accurate information
- Request policy illustrations and review for accuracy (requires an understanding of how the products work)
- Regularly communicate with clients, generally via email and sometimes by phone, to respond to their inquiries, alert them to missed payments, provide information, etc.
- Problem-solve client issues and escalating to higher level internal management when applicable
- Generate or update policy summaries for new and existing clients
- Prepare periodic policy reviews for inforce policies
- Use insurance company software to run (or request from insurance companies) inforce policy illustrations. Review the results with a critical eye, comparing to the illustrations from the time of policy issue as well as prior inforce illustrations. Identify results that don't make sense or are inconsistent with expectations. Proactively prepare or obtain additional illustrations that are logical follow-ups based on the results of the initial illustrations.
- Prepare insurance portfolio reviews in
- Create new formats / templates for scenarios not adequately covered by existing templates



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- Work with the Design team when advanced analytics are needed
- Update and maintain client information and document all client transactions

Ideal Candidate will Possess the Following:

- Bachelor's degree
- Highly detail-oriented
- Superior follow through skills
- Proficiency in Microsoft Outlook, Word, and Excel
- Strong interpersonal communications skills (both written and oral)
- Impeccable client service orientation
- Willingness to learn and grow in a productive, challenging environment
- Ability to prioritize, stay organized, and multi-task in a fast-paced environment
- Exemplify core principles of the firm: Punctuality, Accountability, Excellence, and Thoroughness
- Have a strong work ethic and commitment to the highest standards of excellence
- Demonstrate a strong sense of ownership over their work, always engaging in collaborative and team-oriented approach
- Value feedback to raise the bar individually and collectively for the team

Working Conditions/Demands/Complexity:

- Required to work on a computer for a substantial part of the day
- Frequent work in the evenings and occasionally weekends, as needed to meet deadlines
- A strong fundamental skill set in the above areas from the outset. Candidate will have a unique opportunity to apply and grow these skills in a highly productive, successful, and challenging environment
- Eligible for Profit Sharing
- Eligible for Equity Participation Program

Compensation / Benefits:

- Attractive annual compensation package is commensurate with experience
- Comprehensive benefit package includes medical, dental, life, disability, 401(k), Section 125, and other voluntary benefits.
- Eligible for annual bonus based on firm's net profit and employee's job performance – (profit sharing)
- Eligible for firm's Employee Participation Plan – (revenue sharing)

To apply, please contact:

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