WINGED KEEL GROUP®

CAREERS

Position Title: Reporting Analyst

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, and 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 Reporting Analyst supports the Client Services Team by preparing statements and analyzing data primarily in Excel to service the wealthiest families in the country with their insurance policies. This is an exciting role for someone who possesses the ability to meet deadlines in a fast-paced environment, manage projects, stay organized, complete highly detail-oriented work, is intellectually curious, enjoys an entrepreneurial environment, and has strong technical, financial math, and analytical skills. You will work with a highly intelligent, energetic and collaborative team. The work is intellectually stimulating and challenging, and hard work is recognized and rewarded.

Position Responsibilities:

- Obtain and analyze large complex sets of data from various sources. Reconcile data, resolve any issues, and correct erroneous data.
- Maintain and update complex Excel models to generate and produce presentation-ready reports, by utilizing Excel tools such as VLookup, Pivot Tables and Macros.
- Create ad hoc presentations and spreadsheets based on client requests.
- Facilitate all administrative aspects of the movement of money/fund allocations as requested.
- Understand, obtain, and present fund information available to clients.
- Modify and improve Excel models to make them more user-friendly for other members of the Client Services team.
- Improve and create procedures to provide greater efficiency in the overall reporting process.
- Obtain, organize, and verify data from the insurance companies, identify and resolve issues with data.
- Able to run and review various statements using proprietary software and ensure timely delivery.
- Collaborate with internal and external database engineers on database improvements.
- Manage and deliver custom and ad hoc reporting for specific clients.
- Identify and implement ways to improve the reporting process.
- Prepare premium invoices, email drafts, and policy reviews.
- 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.
- Develop good relationships with insurance carrier contacts.

- 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 and compare results with original illustrations and identify any discrepancies. Proactively prepare or obtain additional illustrations that are logical follow-ups based on the results of the initial illustrations.
- 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
- Advanced proficiency in Microsoft Excel, and proficiency in Outlook and Word
- Strong ability to understand, evaluate, and present technical and analytical information in a concise and clear manner
- Highly detail-oriented
- Strong interpersonal communications skills (both written and oral)
- Impeccable client service orientation and superior follow through skills
- 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
- A big plus will be proficiency with databases and understanding of database structure. Ability to import/export data, create and run reports and effectively gather information
- Understanding of particular financial math concepts like gross and net rates of return, gain/loss
- A fast and keen learner of new concepts who is always willing to help the team
- Understanding of technical aspects in life insurance strategies a plus
- 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

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Compensation / Benefits:

- Attractive annual compensation package 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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