Position Title: Reporting Analyst

Reports to: Shammi Dowla, Director of Client Services

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, San Francisco, Boston, Richmond, and Washington, D.C., 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:

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.

As a Reporting Analyst you will not only learn about servicing the wealthiest families in the country with their insurance policies, and providing highly complex reporting, but you will also gain in-depth experience in developing task management and time management skills, relationship/rapport building with clients, effective communication skills, MS Excel Skills, and an exceptional attention to detail. The work is intellectually stimulating and challenging, and hard work is recognized and rewarded.

Position Responsibilities:

- Manage every step of the production and the review of periodic reports for large cases and Private Placement policies.
- Obtain and analyze large complex sets of data from various sources such as data downloads, email, phone and fax, in various formats such as PDFs, Excel, and data files. Efficiently reconcile, understand, resolve any issues, and correct erroneous data.
- Build and update extremely complex Excel models to generate and produce presentation-ready reports, by utilizing Excel tools such as VLookup, Pivot Tables, and Macros. Modify and improve Excel models to make them more user-friendly for other members of the Client Services team.
- Ensure the timely delivery of reports by maintaining excellent task management and prioritization skills, while working closely with insurance companies and colleagues.
- Build and maintain excellent relationships with clients, and act as the primary point of contact for many clients and advisors, including one of our largest clients.
- 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.
- Improve and create procedures to provide greater efficiency in the overall reporting process.
- Collaborate with internal and external database engineers on database improvements.
- 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.
- 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:

- Experience in Life Insurance (a plus)
- Licensed – Series 6, 63, Life, Accident & Health (a plus)
- Extremely detail-oriented
- Natural problem solver who can work on own initiative, and equally as well in a team
- Strong technical, organizational and prioritization skills
- Strong proficiency with Excel and Outlook
- Ability to pick-up and understand new software and technology relatively quickly
- Understanding of particular financial math concepts like gross and net rates of return, gain/loss
- Proactive with a can-do and will-do approach to work
- Deadline driven with the ability to work in a fast paced environment, under pressure
- Ability to maintain a good relationship with common contacts
- A fast and keen learner of new concepts always willing to help 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 firms Employee Participation Plan – (revenue sharing)

To apply, please contact:

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