

Position Title: Underwriting Assistant

Office Location: New York or Boston

Reports to: Kate Vinchot, Director of Underwriting

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:

The individual in this position acts as an instrumental resource by providing administrative support to the Underwriting team with case set up, ordering carrier forms, tracking underwriting requirements, and entering data for new policies.

Essential Functions:

- Case set up: Create client folder and case record in database
- Prepare client HIPAA Authorization forms for signature
- Order Attending Physician Statements (APS's) from doctors' offices, arrange for payment, and follow up regularly until obtained
- Obtain prescription checks, exam paperwork, lab results, and motor vehicle reports
- File and save documents in client and department resource folders
- Submit underwriting files and paperwork to carriers
- Assist with tracking and recording carrier informal offers in spreadsheet
- Download life insurance application paperwork and supplemental forms
- Complete life insurance applications and prepare for delivery, tagging for required signatures
- Copy and scan applications, policies, and other documents
- Fax documents to insurance carriers and vendors
- Prepare policy delivery packages to client
- Prepare invoices
- Data entry: Input client, application, and policy information in company database
- Print and maintain department forms
- Run Portfolio Summaries
- Create FedEx labels and packages, and oversee sending out packages via messenger service
- Assist with the file breakdown when a case closes and the transition of the case to the Client Services team
- Develop basic knowledge of carrier products

- Oversee reimbursement of APS and exam fees from carriers
- Assist in the coordination of underwriting technology projects

Qualifications:

- Bachelor's degree
- Extremely strong detail orientation
- Strong communications skills - written and verbal
- Strong ability to work independently and as part of a team
- Ability to work with repetitive routine processes and maintain accuracy and efficiency
- Ability to organize, prioritize and manage multiple tasks and requests
- Ability to set and meet deadlines
- Ability to perform well under pressure
- Ability to multi-task and handle multiple requests
- Proficiency in Word and Outlook and basic knowledge of Excel and PowerPoint
- Ability to operate in a fast-paced environment along a steep learning curve

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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