CAREERS

Position Title: Client Analyst Intern

Office Location: New York

Reports to: John Kessinger, Director

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:

This is a 9-10 week internship which is designed to give insight into the sales, marketing, and design analysis functions of the firm and the impact interns can have on its success. The intern will work closely with Client Relationship Associates, providing support with research, analysis, and assisting with client deliverables for various projects and business tasks. It is important that interns demonstrate their capabilities and make an impression from the outset.

The learning curve is steep and will require the individual to quickly immerse themselves in the role. Along the way, there is a supportive team encouraging success. This is an excellent first step towards building a strong skill set in a thriving, growing, demanding organization.

Position Responsibilities:

- Perform analysis and run illustrations for various insurance dedicated-hedge fund and private client cases.
- Tee-up communications for Client Relationship Managers to send out to prospects in advance of early-stage and initial meetings, which involves working with existing templates and attaching the proper documents.
- Track Private Placement and fund opportunities, including initial data input of opportunities, updating their status, and output sorted lists. Update and maintain these opportunity pipelines.
- Create Client Relationship Management-specific prospect lists and update them along with Client Relationship Management activity.
- Prepare marketing materials, fact sheets, and implementation timelines requested by bankers and hedge fund managers.
- Conduct various ad-hoc research regarding Private Placement Brokerage and Private Client opportunities.
- Research underlying fund holdings for funds that do not publish their positions.

- Conduct basic research on marketing lists for which types of clients we are going to track and target/market.
- Check through documents to make sure they are presented in correct order.
- Print out and sort materials before meetings on tight time frames.
- Make cosmetic edits to PowerPoint and Excel documents.
- Illustrate a spectrum of life insurance and annuity products available from major life insurance companies.

Ideal Candidate will Possess the Following:

- Enrolled in a top tier school, Finance, Law or Economics major preferred
- Minimum GPA of 3.0
- Strong technical capabilities in the area of financial analytics
- Strong proficiency in Excel (vlookups, pivot tales, formulas), Word, PowerPoint, and Outlook
- Ability to produce consistent high-quality work in a fast-paced environment
- Has the personal self-discipline to remain organized and manage multiple priorities effectively
- Attentive to details
- Capable of working independently as well as within a team environment
- Takes initiative and proactive team player
- Possesses extremely strong interpersonal skills, personable and likeable
- Highly effective communicator, both verbal and written
- Positive, can-do attitude

To apply, please contact:

Nicole Harrington
Director, Talent Acquisition & Development
1700 Broadway, 34th Floor
New York, NY 10019
careers@wingedkeel.com | www.wingedkeel.com