



WINGED KEEL GROUP®

CAREERS

Position Title: Client Services PPLI Intern
Office Location: New York
Reports to: Christian Lysinger, 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 Boston, Houston, New York, San Francisco, 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:

Seeking a diligent, conscientious, and detailed oriented student who can commit to an internship designed to support our Client Services & Reporting department starting in Fall 2021 and continuing through the spring semester. This 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.

Excellent opportunity to expand your skill set in a fast-paced, entrepreneurial environment. Must be dedicated and reliable with a strong willingness to learn and grow.

Position Responsibilities:

- Obtain and analyze large, complex sets of data from various sources and in various formats such as PDFs, Excel, and data files.
- Upload or manually enter fund data into reporting database; Efficiently research, reconcile, understand, resolve any issues, and correct erroneous data.
- Ensure the timely delivery of reports by maintaining excellent task management and prioritization skills, while working closely with insurance companies and colleagues.
- Update and organize fund information
- Provide assistance with project work and miscellaneous administrative tasks (e.g. copying, scanning, data entry)

Ideal Candidate will Possess the Following:

- Pursuing a Bachelor's degree
- Highly detailed oriented with a strong ability to organize and prioritize
- Proficiency in Microsoft Office, especially MS Outlook and Excel
- Reliable and committed to a 8-9 month internship assignment
- Must be available to intern 20 hours per week
- Comfortable working in the office



WINGED KEEL GROUP®

- Effective communication and interpersonal skills / team player
- Proactive and takes initiative with strong follow through
- Positive, can-do attitude

To apply, please contact:

Nicole Harrington

Director, Talent Acquisition & Development

careers@wingedkeel.com | www.wingedkeel.com