



WINGED KEEL GROUP®

CAREERS

Position Title: Client Relationship Manager

Office Location: San Francisco, Chicago, Miami, Richmond, New York

Reports to: Eric Naison-Phillips, CEO

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, Richmond, San Francisco 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 primary function of the Client Relationship Manager is to successfully market the products and services we offer to existing and new Centers of Influence and potential clients. You will be expected to develop expertise with respect to the products and services we offer, and about the acquisition strategies our clients and their advisors employ to acquire such products. Further, our expectation is that you will perform at a level of quality that enhances the reputation of Winged Keel Group which will enable and expand client relationships.

Position Responsibilities:

- Build long term relationships with Centers of Influence (Trust & Estate Attorneys, CPAs, Investment Managers, Financial Advisors)
- Create sales plans to generate revenue
- Understand, illustrate, and present a spectrum the life insurance and annuity products available from major life insurance companies
- Ensure the company and client adhere to contract terms
- Collaborate with internal teams (Case Design, Underwriting, Client Services, Marketing)

Ideal Candidate will Possess the Following:

- Bachelor's degree
- 4+ years experience in the life insurance industry
- Superior relationship building and interpersonal skills
- Ability proactively prospect referrals in the ultra-affluent market
- Strong technical skills
- Strong closing capabilities
- Established a book of business generating a minimum of \$1mm in annual revenue
- Effective listener and communicator
- Ability to prioritize and meet deadlines in a fast-paced sales / entrepreneurial environment



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- Ability to work well both independently and in a team environment
- Critical reviewer and creative thinker
- Understanding of technical aspects in life insurance strategies
- Knowledge of life insurance products, tax laws, and estate planning

Working Conditions/Demands/Complexity:

- Success and growth will require frequent work on weekends and/or evenings
- Success requires a strong fundamental skill set in the above areas on day one. This position provides a unique opportunity to apply and grow these skills in a highly productive, successful, and challenging environment.

Compensation/Benefits:

- Attractive annual compensation package is commensurate with experience
- Comprehensive benefit package includes medical, dental, vision, life, disability, 401(k), FSA, and other voluntary benefits.

To apply, please contact:

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