WINGED KEEL GROUP®

CAREERS

Position Title: Client Services Associate

Office Location: Richmond, VA / Boston, MA / New York, NY

Reports to: Brigette DiNicola, 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, Houston, 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 best in class service to our ultra-high net worth clients. Offering a suite of services that include customized reporting, premium invoicing, task management, and the preparation of client life insurance portfolio reviews, the bedrock of this department is our disciplined approach to monitoring and maximizing the performance of our clients' portfolios. The client is always our first priority and taking a close second is our commitment to collaborating within the team to meet objectives and expectations in a timely fashion.

The successful Client Services Associate will use his or her knowledge of life insurance and client service experience to follow our established processes and prepare deliverables. Relevant skills that an Associate will be able to further develop in this role include task management and time management skills, effective communication skills, and an exceptional attention to detail. The work is challenging, and hard work is recognized and rewarded.

Position Responsibilities:

- Obtain policy values, forms, and information from insurance carriers
- Use insurance company software to run (or request from insurance companies) inforce policy illustrations. Identify results that don't make sense or are inconsistent with previous illustrations. Proactively prepare or obtain additional illustrations as needed.
- Prepare premium invoices and policy summaries
- Prepare paperwork for and process death claims, surrenders and withdrawals, policy changes such as title and allocation changes; follow up where needed to manage multi-step transactions through to completion and confirm accurate processing
- Update and maintain client information; document all client transactions
- Understand and adhere to compliance procedures when working with variable life insurance
- Use Excel to prepare complex insurance portfolio reviews that include multiple product types and funding scenarios with IRR calculations; create new Excel templates for scenarios not adequately covered by existing formats
- Review work of teammates; identify errors and recommend enhancements that will contribute to an improved customer experience

- Assist clients and advisors with questions about insurance portfolios. Anticipate additional questions and information required for others to make informed decisions. Prepare and explain relevant analysis.
- Understand income tax attributes of life insurance and strategies used to fund life insurance in a tax efficient manner
- Prepare split dollar reporting
- Proactively communicate with internal Client Relationship Managers
- Coordinate with the Design team when advanced analytics are needed

Ideal Candidate will Possess the Following:

- Bachelor’s degree
- Industry Licenses (a plus) – Series 6, 63, Life, Accident & Health
- Proficiency in Microsoft Outlook, Word, and Excel
- Understanding of life insurance products (term, whole life, UL, IUL, GUL, VUL)
- Experience with life insurance customer service
- Problem solver; aware of when to escalate issues
- Ability to prioritize, stay organized, and manage multiple tasks and deadlines in a fast-paced environment
- Ability to pick-up and understand new software and technology relatively quickly
- Understanding of basic financial math concepts like gross and net rates of return, gain/loss
- Understanding of estate planning fundamentals (a plus)
- Ability to develop and maintain positive relationships within the firm and with common outside contacts
- Strong interpersonal communications skills (both written and oral)
- Willingness to accept constructive feedback
- Strong work ethic and commitment to the highest standards of excellence
- Strong sense of accountability and ownership of his or her work

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

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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