



WINGED KEEL GROUP®

CAREERS

Position Title: Underwriting Associate

Office Location: Boston, Houston, New York, Richmond, or San Francisco

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 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 Life Insurance Underwriting Associate is responsible for the coordination and management of all aspects of the underwriting and implementation process. This includes providing efficient, pro-active service to clients, negotiating with the life insurance companies, and having in-depth knowledge of life insurance products and carriers, applications and the underwriting process.

Essential Functions/Major Duties:

- General underwriting case management
- Provide regular case status updates to the Client Relationship Managers (CRMs) and Project Managers (PMs)
- Ensure that status updates are emailed to clients and advisors either directly or through the CRMs and PMs regularly
- Confirm that agent is contracted, licensed, and appointed
- Conduct 15-30-minute telephone interviews with clients or advisors to collect their personal, financial, medical, and avocation history
- Schedule medical exams, send reminders and follow up to ensure successful completion
- Coordinate ordering of APS records and review records upon receipt to assess medical history
- Negotiate with carrier underwriters for best possible risk classification and elimination of additional requirements
- Understand how final offers will impact the case design and work cooperatively with design analysts to update the design appropriately
- Complete and review life insurance application paperwork
- Work closely with insurance company case managers to ensure all items are processed and policies are issued in an efficient and timely manner
- Prepare and send Portfolio Summaries to clients after coverage has been placed in force
- Breakdown underwriting files and inform Client Services team of future administrative obligations for the portfolio



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Qualifications:

- Strong knowledge of the life insurance underwriting process and life insurance terminology preferred
- 3-5 years' experience in the life insurance industry preferred
- Knowledge of broker-dealer and licensing preferred
- Strong understanding of life insurance risk classifications
- General medical knowledge (ability to read Attending Physician Statements)
- Strong interpersonal and communication skills – written and verbal
- Strong negotiating skills
- Strong problem-solving skills
- Proficient in Word and Excel
- Ability to work in a fast-paced environment along a steep learning curve
- Ability to organize, prioritize and manage multiple tasks and requests
- Ability to work under pressure and meet deadlines while being pro-active
- Highly detail oriented
- Exercises good judgment

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 firm's Employee Participation Plan (revenue sharing)

To apply, please contact:

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