Position Title: Client Services Assistant

Office Location: Boston or Richmond

Reports to: Jennifer Fitzgerald, Client Services 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, Washington, D.C., and Houston, 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 the highest quality 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 is a disciplined approach towards servicing and monitoring the performance of our client portfolios. The client is always the first priority, and taking a close second is the commitment to collaborating with the team to meet objectives and expectations in a timely fashion.

The Client Services Assistant will not only learn about servicing insurance policies for wealthy, sophisticated clients, but will also develop task management and time management skills, relationship / rapport building with clients, effective communication skills, and an exceptional attention to detail. The work is intellectually stimulating and challenging, and hard work is recognized and rewarded.

Position Responsibilities:

- Prepare premium invoices, email drafts, and policy reviews. Identify errors and recommend enhancements that will contribute to an improved and excellent level of customer service
- Obtain policy values, forms, and information from insurance carriers via carrier websites, phone, and fax
- Develop good relationships with insurance carrier contacts who we rely on to provide prompt and accurate information
- Request policy illustrations and review for accuracy or use insurance company software to run illustrations
- Regularly communicate with clients, generally via email and sometimes by phone, to respond to their inquiries, alert them to missed payments, provide information, etc.
- Problem-solve client issues and escalating to higher level internal management when applicable
- Generate or update policy summaries for new and existing clients
- Prepare periodic policy reviews for inforce policies
- Update and maintain client information and document all client transactions

Qualifications:

- Bachelor’s degree
- Experience in the life insurance industry a plus
- Highly detail-oriented
- Superior follow through skills
- Proficiency in Microsoft Outlook, Word, and Excel
- Strong interpersonal communications skills (both written and oral)
- Impeccable client service orientation
- Willingness to learn and grow in a productive, challenging environment
- Ability to prioritize, stay organized, and multi-task in a fast-paced environment
- Exemplify core principles of the firm: Punctuality, Accountability, Excellence, and Thoroughness
- Have a strong work ethic and commitment to the highest standards of excellence
- Value feedback to raise the bar individually and collectively for the team

Working Conditions/Demands/Complexity:

- Required to work on a computer for a substantial part of the day
- Occasional work in the evenings or 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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