



WINGED KEEL GROUP®

CAREERS

Position Title: Intern to Director of Innovation and Operations (DIO)

Office Location: New York

Reports to: Edward Chan, 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, 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:

This position serves as an instrumental resource by assisting the Director of Innovation and Operations on projects relating to developing technology solutions to support the company's growth strategy.

Position Responsibilities:

- Perform quality checks on data of our technology applications to ensure consistency
- Improve Excel templates and conduct prototype testing
- Assist with ad-hoc data analytics and research projects
- Other miscellaneous administrative tasks (e.g. scheduling, data entry)

Qualifications:

- Pursuing a Bachelor's Degree
- Business Analytics or Computer Science background preferred
- Able to work 20+ hours a week through December 2021
- Intermediate in Microsoft Excel
- Experience with the following Excel functions: IFNA, VLOOKUP, HLOOKUP, XLOOKUP, MATCH, COUNTA functions, filter, sort, and Pivot Tables
- Proficiency in Microsoft PowerPoint, Word, and Outlook
- Strong ability to prioritize, stay organized and highly detail oriented in a fast-paced environment
- Must have positive and can-do attitude

To apply, please contact:

Nicole Harrington

Director, Talent Acquisition & Development

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