



WINGED KEEL GROUP®

CAREERS

Position Title: Junior Salesforce Administrator

Office Location: New York

Reports to: Edward Chan, Director of Innovation and Operations

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 supporting the Director of Innovation and Operations on an exciting growth project relating to the development of technology solutions to support the company's growth strategy. The Junior Salesforce Administrator will be involved in the designing, development, testing, implementation, and user support of Salesforce and other technology applications. This is an excellent opportunity to learn about Business Intelligence and data structures designed to build greater efficiencies and internal collaboration for a dynamic, growing organization.

Position Responsibilities:

- Perform data management activities such as importing and exporting data and improving data quality through cleansing and deduplication
- Conduct testing on new and ongoing development projects
- Handle core administrative functions including:
 - Report and dashboard development and maintenance
 - Field and Page layouts creation and modification
 - User security and permissions configurations
- Assist in development and maintenance of non-Salesforce solution such as Tableau dashboards and Excel templates
- Create training documentation and provide day-to-day user support

Qualifications:

- Required:
 - Salesforce Administrator Certification is required
 - Experience loading and extracting data to and from Salesforce
 - Intermediate Excel skills and experience with data manipulation/ETL process
 - 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
- Desirable:
 - Hands-on experience as a Salesforce Administrator specifically with Financial Services Cloud is a plus, but not required
 - Bachelor's/Postgraduate degree, professional qualification, or relevant experience.
 - Tableau experience is a plus, but not required



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To apply, please contact:

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