



WINGED KEEL GROUP®

CAREERS

Position Title: Office Administrative Assistant

Office Location: New York

Reports to: Nicole Harrington, Managing 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:

Seeking a diligent, conscientious, and detail-oriented individual with exceptional interpersonal skills. The Office Administrative Assistant will provide key support in the daily administration of a fast-paced office. To be successful, the Office Assistant will need to work cooperatively with the Executive Assistant team and external contacts to support office operations. This is an excellent role for someone who is extremely organized, knows how to prioritize effectively and who thrives in a fast-paced entrepreneurial environment.

Position Responsibilities:

- **Oversee day-to-day functioning of the office**
 - Manage the office supply budget
 - Screen incoming phone calls, working alongside Executive Assistant team
 - Handle complex office repairs and maintenance in coordination with building team and preferred vendors
 - Manage distribution of all office mail
- **Prepare meeting materials for Client Relationship Managers, working closely with the Design Assistant and Executive Assistant team**
 - Handle printing, binding, and shipping appropriate marketing materials
 - Inventory management, ordering, stocking for all binding supplies
- **Liaise with building management and preferred vendors**
 - Develop and maintain relationships with building and vendor personnel
 - Help manage firm's off-site document storage and oversee annual storage review
 - Coordinate office access and security, including employee ID cards
- **Manage updates for internal SharePoint homepage, employee directory, and office administration resources**
- **Plan and execute internal events, including Staff Meeting lunches, happy hours, and other firmwide activities, working closely with Managing Director of People & Culture**



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- Assist with sending packages via messenger service
- Perform miscellaneous administrative tasks on an as needed basis (i.e. faxing, photo-copying, scanning, etc.)

Ideal Candidate Will Possess the Following:

- At least 1 year of experience working a fast-paced corporate environment
- Experience in office management, reception, or executive assistance
- Highly detail oriented
- Exceptional skill set in organizing and systematizing processes
- Inventory and budget management a plus
- Exceptional interpersonal skills both written and verbal
- Proficiency in MS Office
- Strong ability to multi-task and handle multiple requests simultaneously
- Superior initiative to accomplish tasks efficiently and meet deadlines
- Positive, can-do attitude
- Reliable, punctual, and dedicated
- Team player

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:

Nicole Harrington
Managing Director, People & Culture
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