

POSITION TITLE: Senior Underwriting Associate

JOB LOCATION: Anywhere

REPORTS TO: Kate Vinchot, Director of Underwriting

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#### 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, New York, Houston, San Francisco, Washington, D.C., Atlanta, and Denver, 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 Senior Underwriter is responsible for the coordination and management of all aspects of the underwriting and implementation process for the financial institutions channel. This includes providing leadership to the team, creating efficient processes and procedures for the team to follow, and delivering pro-active and reactive support to financial advisors and clients for our most productive regions. The individual will have strong skills in negotiating with the life insurance companies and have an in-depth knowledge of life insurance products and carriers, applications and the overall underwriting process.

#### Position Responsibilities:

- Develop and improve operating procedures for the financial institutions channel
- Lead the financial institutions team as it continues to grow. This will include working with Senior Leadership on developing the team and making sure resources are adequate to continue to support growth
- General underwriting case management for our most productive CRMS and able to maintain a high volume of cases
- Must have knowledge of Financial Institution guidelines and procedures
- Provide regular case status updates to the Client Relationship Managers (CRMs)
- Ensure that status updates are emailed to clients and financial advisors either directly or through the CRMs
- Confirm that ticketing and financial institution guidelines and procedures are met
- 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 as necessary upon receipt to assess medical history

- Negotiate with carrier underwriters for best possible risk classification and elimination of additional requirements
- Complete and review life insurance application paperwork in conjunction with Underwriting Associate
- Work closely with insurance company case managers to ensure all items are processed and policies are issued in an efficient and timely manner
- Breakdown underwriting files and inform Client Services team of future administrative obligations for the portfolio

Ideal Candidate will Possess the Following:

- 10+ years Case Management / Underwriting experience
- Knowledge of financial institutions and the different procedures
- Experience working closely with Sales Producers to move cases through the process
- Strong time management skills
- 5+ years working with financial advisors and their clients
- Strong carrier relationships and experience
- Attention to detail and accuracy
- Ability to work closely with a team and act as a leader
- Strong communication skills
- Excellent problem-solving skills
- Experience with case management systems, Microsoft Word, and Outlook

Working Conditions/Demands/Complexity:

- Required to work on a computer for a substantial part of the day
- Work in the evenings and occasionally weekends, as needed to meet deadlines
- A strong fundamental skillset 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)

To apply, please contact:

[careers@wingedkeel.com](mailto:careers@wingedkeel.com) | [www.wingedkeel.com](http://www.wingedkeel.com)