

POSITION TITLE: Finance Assistant
JOB LOCATION: New York or Richmond
REPORTS TO: Vikash Haritwal, CFO

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, 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:

Seeking a diligent, conscientious, and detailed oriented Finance Assistant to support our Finance & Accounting department with bookkeeping and administrative duties. This is an excellent opportunity to expand your skill set in a fast-paced, entrepreneurial environment. Must be dedicated and reliable with a strong willingness to learn and grow.

Position Responsibilities:

- Enter daily bank transactions into the accounting system
- Record accounts payable transactions accurately and in a timely manner
- Enter daily commission transactions
- Record S-Corp bank transactions, ensuring all entries are categorized correctly
- Input corporate credit card transactions into the accounting system
- Enter payroll journal entries into the accounting system
- Assist in month-end financial closing processes as directed by the Finance Manager
- Maintain accurate and organized financial records
- Ensure compliance with company accounting policies and procedures
- Assist with financial audits and provide documentation as required
- Collaborate with other departments to obtain necessary information and resolve discrepancies
- Perform other related duties as assigned by management

Ideal Candidate Will Possess the Following:

- Bachelor's degree in accounting, finance, or related field preferred
- 1-2 years of experience in a similar role, preferably in a corporate environment
- Proficiency in Microsoft Office Suite, particularly Excel, and experience with accounting software (QuickBooks)
- Strong attention to detail and accuracy in data entry and financial reporting
- Excellent organizational and time management skills
- Ability to work independently with minimal supervision and as part of a team
- Strong analytical and problem-solving skills
- Understanding of basic accounting principles and practices
- Ability to maintain confidentiality concerning financial data

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 | www.wingedkeel.com