Position Title: Reporting Analyst

Location: New York

Reports to: Christian Lysinger – Director, Client Services

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:

Winged Keel Group's Client Services department focuses on delivering the highest quality service to our ultra-high-net-worth clients. Offering a suite of services for private placement and annuity portfolios that includes customized reporting, premium invoicing, task management, and the preparation of portfolio reviews, the foundation of our department is our disciplined approach to servicing and monitoring the performance of our client insurance portfolios.

As a Reporting Analyst you will not only learn about servicing life insurance for the wealthiest families in the country and providing highly complex reporting, you will also develop task management and time management skills, effective communication skills, MS Excel Skills, and an exceptional attention to detail. The work is intellectually stimulating and challenging, and hard work is recognized and rewarded.

Position Responsibilities:

- Manage the timely production and review of monthly statements for private placement policies by working closely with insurance companies and colleagues
- Obtain and upload large sets of data to a proprietary database to facilitate statements. Efficiently reconcile data; understand and resolve any issues
- Build and update complex Excel models to generate and produce presentation-ready reports, by utilizing Excel tools such as Vlookup and PivotTables. Modify and improve Excel models to make them more user-friendly for other members of the Client Services team.
- Develop and maintain excellent relationships with insurance company contacts, clients, and advisors
- Regularly communicate with clients and advisors, generally via email and sometimes by phone, to respond to inquiries, alert them to missed payments, provide information, etc.
- Use insurance company software to run (or request from insurance companies) inforce policy illustrations.
- Prepare periodic policy reviews for inforce policies using standard templates

- Create ad hoc presentations and spreadsheets based on client requests
- Facilitate all administrative aspects of requested policy changes, including the movement of money/fund allocations, as requested
- Obtain, understand, and present fund information available to clients
- Problem-solve client issues and escalate to higher level internal management when applicable
- Update and maintain client information and document all client transactions
- Adhere to broker-dealer compliance requirements

Ideal Candidate Will Possess the Following:

- Experience in Life Insurance (a plus)
- Licensed – Series 6, 63, Life, Accident & Health (a plus)
- Extremely detail-oriented
- Natural problem solver who can work on own initiative, and equally as well in a team
- Strong technical, organizational and prioritization skills
- Strong proficiency with Excel and Outlook
- Ability to pick-up and understand new software and technology relatively quickly
- Understanding of financial math concepts like gross and net rates of return, gain and loss
- Proactive with a can-do and will-do approach to work
- Deadline driven with the ability to work in a fast-paced environment, under pressure

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 firms Employee Participation Plan – (revenue sharing)

To apply, please contact:

Nicole Harrington
Managing Director, People & Culture
careers@wingedkeel.com | www.wingedkeel.com