

POSITION TITLE: Executive Assistant / Office Manager

JOB LOCATION: Denver

REPORTS TO: Merrill Rome, 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, 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 Executive Assistant will be providing a high level of service to one Principal, helping them coordinate extremely active calendars, meetings (internal and external), travel, and speaking with ultra-affluent clients and advisors in a professional and gracious manner. Support to other Principals will also be expected. To be successful, the Executive Assistant will need to work cooperatively with the other Executive Assistants to support each other, and coordinate calendars and events with the other Principals in the firm. This role also includes overseeing all operational aspects to keep the office running efficiently.

Position Responsibilities:

Executive Assistance:

- Heavy calendar management in MS Outlook
- Schedule internal and external client meetings (both in person and via Zoom or MS Teams)
- Update and manage scheduling lists, contact lists, and task lists
- Coordinate and manage travel itinerary
- Entering and maintaining detailed client information in a CRM database
- Develop strong familiarity with clients, carriers, and client relations.
- Screen incoming phone calls
- Exercise superior judgment on transferring calls, taking messages, or getting the caller to the appropriate party

- Draft emails
- Take an active interest in the Principal's activities and be anticipatory and proactive with deliverables
- Become familiar with Principal's Top 20 cases/clients/advisors
- Draft emails, memo's, letters

Office Management:

- Manage supplies and office inventory
- Manage all issues related to office upkeep (working with building management to resolve any fixes in the offices, etc)
- Oversee office kitchen inventory and set up
- Replenish paper in copy machines
- Maintain organization and cleanliness in office
- Manage miscellaneous special projects
- Manage sorting and distribution of mail

Ideal Candidate Will Possess the Following:

- Minimum of 4-6 years of experience working as an Executive Assistant experience (in the Financial Services industry a plus)
- Experience supporting Senior executives
- Ability to function effectively while under pressure in a fast paced and evolving environment
- Ability to juggle many tasks at once, and quickly shift gears and re-prioritize as needed
- Ability to remain patient, flexible, and focused
- Superior communication/interpersonal skills both verbal and written
- Superior follow through, and organizational and task management skills
- Superior response time to heavy email communications
- Highly detail oriented with superior follow through
- Extremely presentable and articulate
- Team player
- Strong customer service orientation
- Strong initiative to accomplish tasks, meet deadlines, and take an active interest in current projects
- Strong initiative to understand our business and key relationships to perform more effectively



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CAREERS

- Proficient in Microsoft Word, Excel, and Outlook
- Experience with heavy calendar management using Outlook
- Positive, pro-active, can-do attitude

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