

**POSITION TITLE:** CLIENT SERVICES INTERN

**JOB LOCATION:** RICHMOND

**REPORTS TO:** JENNIFER FITZGERALD, DIRECTOR

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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, Richmond, 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 detailed oriented student for a 6-month internship assignment to support our Client Services department. This is a great opportunity for someone with keen attention to detail and a strong intellectual curiosity to learn and grow in a dynamic, fast-paced, entrepreneurial environment alongside a collaborative and energetic team. This intern will also be part of a 1:1 mentoring program. You must be able to work at least 16-20 hours per week during the school semester(s) and commit a minimum of a 6-month internship.

The Client Services department focuses on delivering the highest quality, first class service to our ultra-high-net-worth clients. Offering a suite of services that range from customized reporting, premium invoicing, task management, or the preparation of client life insurance portfolio reviews, the root of this department stems from a disciplined approach towards servicing and monitoring the performance of our client portfolios.

### **Position Responsibilities:**

- Create client portfolio summaries and draft client communications
- Assist with client invoicing
- Prepare and review monthly insurance portfolio statements with strict deadlines
- Work with insurance companies to reconcile data discrepancies and facilitate changes in client portfolios
- Provide assistance with miscellaneous administrative tasks (e.g. copying, scanning, data entry)



## Ideal Candidate will Possess the Following:

- Pursuing a Bachelor's degree
- Highly detailed oriented with a strong ability to organize and prioritize
- Proficiency in Microsoft Office
- Reliable and committed to a 6-month internship assignment
- Must be available to intern 16-20 hours/week
- Able to commute and work in the Winged Keel Richmond office
- Effective communication and interpersonal skills/team player
- Proactive and takes initiative with strong follow through
- Positive, can-do attitude

## To apply, please contact:

NICOLE HARRINGTON

*Director, Talent Acquisition & Development*

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