



WINGED KEEL GROUP®

CAREERS

Position Title: Summer Intern

Office Location: Boston, New York, or Richmond

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:

The Winged Keel summer internship program helps develop well-rounded, talented students by cultivating core skills through a series of tasks and responsibilities.

This internship is designed to give insight into the sales, marketing, administration, and design analysis functions of the firm and the impact interns can have on its success. It is important that interns demonstrate their capabilities and make an impression from the outset.

Recruiting for open positions in this program begins in January 2023, however, we will review resumes on a rolling basis so early applications are encouraged. We are seeking to hire bright, dedicated individuals for positions in Client Services, Data Analytics, Financial Analysis, Operations, and Underwriting.

As part of the program objectives, you will have a core set of responsibilities to fulfill. You will be assigned a mentor who will provide on-going guidance, support, and mentorship. There will also be participation in Group Networking/Development such as a group meeting with the President of the firm, and a firm wide off-site company outing, as well as a monthly lunch with a leader of the firm with a discussion topic about our business. The learning curve is steep and will require you to quickly immerse yourself in the role. Behind you will be a supportive team encouraging you to succeed.

Sample Positions Include:

- Client Relations and Reporting: Offers first class service to our ultra-high-net-worth clients by assisting with customized reporting, premium invoicing, task management, and the preparation of client life insurance portfolio reviews.
- Marketing and Operations: Supports the execution of curated events, inventory tracking, and fulfillment of bespoke promotional products, as well as the day-to-day management of a fast-paced office, and special projects.



- Portfolio Analysis and Case Design: Assists the financial analysts in preparing pricing analytics and marketing materials.
- Technology: Works with the Director of Innovation on projects relating to developing technology solutions to support the company's growth strategy.
- Underwriting: Learns about the medical and financial underwriting requirements to acquire life insurance and assists in tabbing applications, scanning applications and documents, and collecting medical history records.

Ideal Candidate Will Possess the Following:

- Pursuing a Bachelor's degree
- Must be available June 1 – August 4, 2023, and able to work 40 hours per week Monday through Friday from 8:30am-5:30pm
- Detail oriented with a strong ability to organize and prioritize
- Proficiency in Microsoft Office
- Proactive and takes initiative with strong follow through
- Previous office experience a plus
- Positive, can-do attitude
- Candidates with strong financial math and Excel skills encouraged to apply

To apply, please contact:

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