

POSITION TITLE: Finance Associate

JOB LOCATION: New York

REPORTS TO: Vikash Haritwal, Principal & Chief Financial Officer

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:

This is not a traditional accounting position. While there will be accounting tasks, the primary focus of this position is to work closely with the Chief Financial Officer on financial reporting tasks such as, P&L statements, Marketer's Share reports, Principals' Financial Statements, Employee payroll & benefits administration, tax filing, compliance tasks, and general accounting. We are seeking a team-player who is highly detail-oriented and organized with strong interpersonal and communication skills.

Position Responsibilities:

- Financial Reporting: Firm and Principal Financial reports, marketers' share reports, gross revenue reports, variance reports
- Annual Budgeting
- Bank and Credit Card Reconciliations
- Payroll & Benefits Administration
- Accounts Payable: Entering and paying invoices, credit card bills, expense reimbursements
- Accounts Receivable: Bank deposits, entering new cases into Commission Tracker.
- Manage CRM Insurance licenses in License Tracker
- Reviewing intern data entry
- Special projects on an as needed basis

Ideal Candidate Will Possess the Following:

- Bachelor's in Accounting or Finance
- Strong proficiency in MS Excel (create tables, pivot tables, VLOOKUPS)
- Demonstrated QuickBooks proficiency and accounting/bookkeeping experience
- Financial math savvy (ability to perform intermediate to advanced financial analysis)
- Ability to work autonomously and perform well under pressure
- Ability to organize, prioritize and manage multiple tasks and requests
- Ability to set and meet deadlines
- Ability to work comfortably in a team environment
- Strong follow through
- High attention to detail
- Ability to operate in a fast-paced environment along a steep learning curve

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