

POSITION TITLE: FINANCE INTERN

JOB LOCATION: RICHMOND

REPORTS TO: SHEREE ENGLE, FINANCE SENIOR ASSOCIATE

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:

Seeking a diligent, conscientious, and detailed oriented student who can commit to a 6-month internship for 18-20 hours per week to support our Finance & Accounting department with bookkeeping and administrative duties. This is a paid internship commensurate with experience.

Excellent opportunity to expand your skill set in a fast-paced, entrepreneurial environment. Must be dedicated and reliable with a strong willingness to learn and grow.

Position Responsibilities:

- Enter Accounts Payable into QuickBooks
- Enter commissions into the commission tracker
- Record credit card and daily cash transactions
- Miscellaneous administrative tasks (copying, filing, scanning)
- Special projects on an as needed basis

Ideal Candidate will Possess the Following:

- Pursuing a Bachelor's degree
- Highly detail oriented with a strong ability to organize and prioritize
- Proficiency in Microsoft Office, especially MS Outlook and Excel
- Experience with QuickBooks a plus
- Reliable and committed to a 6-month internship assignment



WINGED KEEL GROUP®

CAREERS

- 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

Managing Director, People & Culture

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