

POSITION TITLE: Case Design Associate

JOB LOCATION: Atlanta

REPORTS TO: Ken Masters, Principal

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 primary function of the Case Design Associate is to create presentations to assist clients as they make decisions about the portfolio, structure, and funding of new life insurance, or how to optimize the performance of their existing life insurance portfolios.

This role supports the Client Relationship Managers by preparing client presentations primarily in Excel, PowerPoint graphics, and written communications. This is an exciting role for someone who possesses the ability to meet deadlines in a fast-paced environment, manage projects, stay organized, complete highly detail-oriented work, intellectually curious, enjoys an entrepreneurial environment, and has strong technical, financial math, and analytical skills. This person will also get to work with a highly intelligent, energetic and collaborative team.

Position Responsibilities:

- Gather data from Client Relationship Managers, insurance carriers, legal resources, professional advisors, etc.
- Support models of the strategies utilized to fund estate planning life insurance structures
- Illustrate the full spectrum of life insurance and annuity products for major life insurance carriers
- Support model strategies utilized to fund life insurance in a gift tax efficient manner

- Ability to apply the income tax attributes of life insurance, and illustrate how to utilize those attributes to enhance after tax returns through a variable universal life or private placement life insurance policy
- Prepare detailed Excel and PowerPoint presentations for clients and advisors.
- Follow compliance regulations around presenting information related to securities transactions
- Communicate complex financial information in a clear and concise manner, either written or verbally
- Support transition of each sold case beyond design, into the implementation group (Underwriting), and finally to the administration group (Client Service)
- Model compensation data on products sold to provide to the Finance Department
- Model alternatives for optimizing the performance of existing life insurance portfolios

Ideal Candidate will Possess the Following:

- Bachelor's in Economics or Finance preferred
- A minimum of 5 year's experience in the life insurance industry preferred
- Advanced proficiency in Microsoft Excel (Must be proficient in Vlookups, If/Then formulas, Goal Seek, Conditional Formatting, NPV, and IRR)
- Superior financial math aptitude with the ability to perform advanced number crunching
- Strong ability to understand, evaluate, and present technical and analytical information in a concise and clear manner
- Ability to work effectively with senior management and Principals
- Advanced proficiency in Microsoft PowerPoint and Word
- Strong presentation skills
- High attention to detail
- Effective listener and communicator
- Ability to prioritize and meet deadlines in a fast-paced sales / entrepreneurial environment
- Ability to work well both independently and in a team environment
- Critical reviewer and creative thinker
- Understanding of technical aspects in life insurance strategies preferred
- Knowledge of life insurance products, tax laws, and estate planning a plus
- Positive, can-do attitude



WINGED KEEL GROUP®

CAREERS

Working Conditions/Demands/Complexity:

- Attractive annual compensation package is commensurate with experience
- Comprehensive benefit package includes medical, dental, life, disability, 401(k), Flexible Spending Account, and other voluntary benefits.

To apply, please contact:

careers@wingedkeel.com | www.wingedkeel.com