

POSITION TITLE: Producer / Client Relationship Manager

JOB LOCATION: San Francisco

REPORTS TO: Donna Litke, Managing Director, Sales & Development

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 New York, San Francisco, Boston, Richmond, Washington, D.C., Houston, 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 Producer / Client Relationship Manager (CRM) is to proactively market the products and services we offer to existing and new Centers of Influence and potential clients. The CRM will be expected to develop expertise with respect to the products and services we offer, and with the acquisition strategies our clients and their advisors employ to acquire such products. Further, our expectation is that the CRM will perform at a level of quality that enhances the reputation of Winged Keel Group which will enable and expand client relationships.

Position Responsibilities:

- Understand, and present a spectrum of life insurance and annuity products available from major life insurance companies.
- Lead lunch and learns and informational meetings to educate referral sources on products and services.
- Cultivate long term relationships with Centers of Influence (e.g., Trust & Estate Attorneys, Investment Managers, Financial Advisors, Multi-Family Offices, and Single Family Offices) to generate referrals.
- Consistently achieve annual sales targets and goals
- Create proactive sales plans to generate revenue.
- Work collaboratively with other CRMs and manage new opportunities through closing, working with internal Case Design and Underwriting teams.

- Ensure ongoing policy servicing in conjunction with internal Client Service team.

Ideal Candidate will Possess the Following:

- Bachelor's degree
- 5+ years experience in the life insurance industry
- Life insurance license
- FINRA Series 6 or 7, and 63 registrations
- Understanding of technical aspects in life insurance strategies
- Strong knowledge of life insurance products, tax laws, and estate planning
- Superior networking/ relationship building and interpersonal skills
- Ability to proactively prospect referrals in the ultra-affluent market
- Strong closing capabilities
- 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

Working Conditions/Demands/Complexity:

- Commission-based with draw
- Comprehensive benefit package includes medical, dental, vision, life, disability, 401(k), Flexible Spending Account, and other voluntary benefits.

To apply, please contact:

careers@wingedkeel.com | www.wingedkeel.com