



Winged Keel Group Opens Boston Office, Led by Principal Michael A. Mingolelli, Jr. and Kenneth J. Masters

NEW YORK, NY, OCTOBER 4, 2018—Winged Keel Group (“Winged Keel”) is pleased to announce the opening of its Boston office with Michael A. Mingolelli, Jr., JD as the newest Principal of the firm. In addition, Kenneth J. Masters, CFA®, CLU®, ChFC®, AEP® will be joining as its newest Director. Both Michael and Ken will be based out of Boston. This exciting expansion reflects Winged Keel’s long-term commitment to serving the growing demand for sophisticated life insurance solutions among ultra-affluent clients. The new office, which will open in the fourth quarter of 2018, follows the addition of a San Francisco office in 2017. Winged Keel is headquartered in New York City.

Michael joins Winged Keel after serving as CEO of a life insurance and executive benefits advisory firm, where he and Ken collaborated with ultra-affluent clients on the design, implementation, and administration of Traditional and Private Placement Life Insurance and Annuity portfolios. Michael is highly regarded in the Boston advisor community and a frequent speaker on topics surrounding Traditional and Private Placement Life Insurance. He is a member of the Board of Directors of M Financial Group and a former member of the AALU Board of Directors.

Winged Keel Principal Alexander Tuff commented: “In any industry, you naturally gravitate toward those who share the same core values and approach to servicing clients—ours is no different. Our firm has had increasing opportunities to work with Michael and Ken over the last ten or so years and we couldn’t be more pleased to welcome them to the team.” Principal Eric Naison-Phillips, who has been with the firm for 15 years, added: “We are incredibly excited to expand Winged Keel’s presence in New England with Michael and Ken’s leadership and talent at the helm of our third office.”

Michael noted: “Partnering with Winged Keel is a natural next step for us. The firm holds exemplary market leadership and has always placed genuine interest in clients with unmatched integrity—we are culturally and professionally aligned. Ken and I look forward to contributing to the firm’s future success by continuing to exceed the expectations of clients who place their trust in us.”

About Winged Keel Group

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 and San Francisco, and new presence in the Boston area, the firm specializes in the structuring and administration of large blocks of Traditional Life Insurance and large portfolios of Private Placement Life Insurance and Annuities. For more information on Winged Keel Group, please visit www.wingedkeel.com.

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