



Winged Keel Group Announces the Appointment of Four New Principals

NEW YORK, NY, JANUARY 9, 2020—[Winged Keel Group](#) (“Winged Keel”) today announced the appointment of four new Principals: Brian Gartner, Chelsea Maeda, Barbara Novak, and Vikash Haritwal. Each long-tenured member of Winged Keel joined its multi-generational partnership effective January 1, 2020. The promotions follow an exceptional year of growth within the firm’s Traditional Life Insurance, Business Continuation Insurance, and Private Placement Life Insurance businesses, as well as its expansion into the Mid-Atlantic region with new offices in Richmond and Washington, D.C.

Brian Gartner led an outstanding year for West Coast operations in 2019, culminating in a move to a new office space in San Francisco. As Principal, he will remain head of Winged Keel’s San Francisco office and a key contact for West Coast clients and advisors. He will also continue to focus on expanding Winged Keel’s California presence as a market leader in the design, implementation, and administration of sophisticated life insurance and annuity portfolios for ultra high net worth families. He joined Winged Keel in 2011 and moved to San Francisco in 2016 to help develop the firm’s national presence. Gartner graduated with a BA from University of Pennsylvania.

Chelsea Maeda is a Client Relationship Manager responsible for the financial modeling and administration of some of the largest and most complex life insurance portfolios structured by Winged Keel. In 2019, Maeda’s expertise in Business Continuation Insurance for key executives led the firm to codify this work into a separate business segment. She joined Winged Keel Group as an intern in 2007 and has advanced within the organization ever since. Maeda graduated with a BA from Columbia University.

Barbara Novak works with many of the firm’s largest clients on the structuring, implementation, and administration of their Traditional and Private Placement Life Insurance, while also managing business development, compliance, and operational initiatives. Novak joined Winged Keel in 2008 and has been integral to the successful integration of Winged Keel’s Boston, Richmond, and Washington, D.C. operations, leveraging best practices in each new region to optimize the firm’s ability to provide best-in-class client service. Novak graduated with a BA from Columbia University.

Vikash Haritwal has been Chief Financial Officer since 2017, a role he will maintain as Principal. Haritwal continues to play a key part in the financial structuring and execution of Winged Keel’s expansion efforts including new offices in Boston and the Mid-Atlantic region over the past two years. He will continue to be responsible for the firm’s accounting, financial reporting, and licensing. Haritwal joined Winged Keel in 2008 and holds an MBA from Rochester Institute of Technology.

The appointments were announced by Winged Keel Group Principal Eric Naison-Phillips, who commented, “I am incredibly proud of Brian, Chelsea, Barbara, and Vikash for their contributions and commitment over the last decade and to making 2019 our most successful year yet. A life insurance portfolio is typically one of the longest-held assets of a family, and these promotions exemplify our strength in providing continuity of service to our clients through multi-generational governance. With a strong, diverse, and growing partnership, Winged Keel is well-positioned for continued growth in 2020 and beyond.”

**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, San Francisco, Boston, Richmond, 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 Life Insurance and Annuities. For more information on Winged Keel Group, please visit www.wingedkeel.com.

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