WINGED KEEL GROUP®

Life Insurance Financial Analyst (Case Designer)

Position Summary:

The primary function of the Life Insurance Financial Analyst 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, and also 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, is intellectually curious, enjoys an entrepreneurial environment, and has strong technical, financial math, and analytical skills. You will work with a highly intelligent, energetic and collaborative team. This position also provides an opportunity to be groomed and mentored for future Project Manager responsibilities working on our largest and most sophisticated cases.

Essential Functions:

- Gather information from Client Relationship Managers, insurance companies, legal resources, professional advisors, etc.
- Understand, illustrate, and present a spectrum the life insurance and annuity products available from major life insurance companies
- Prepare complex and technical Excel presentations, as well PowerPoint presentations, for clients and advisors
- Understand and model strategies utilized to fund life insurance in a gift tax efficient manner
- Understand the income tax attributes of life insurance, and how changes in tax and other legislation will impact our analyses
- Understand the fundamentals of estate planning
- Illustrate how to utilize tax attributes to enhance after-tax returns through variable universal life or private placement life insurance policies
- Model alternatives for optimizing the performance of existing life insurance portfolios
- Construct portfolio recommendation options based on numerous moving parts, e.g. insurance company pricing and product changes, underwriting results and changes, and tax and legislative changes
- Spot trends and patterns present in analytics, identify the source of counter-intuitive patterns, and be prepared to explain the patterns to the marketing team
- Communicate complex financial information in a clear and concise manner, either in writing or verbally
- Keep the Client Relationship Managers aware of deadlines that would impact the implementation of cases
- Complete ad hoc departmental projects, e.g., product studies

Qualifications:

- Advanced proficiency in Microsoft Excel (Must be proficient in Vlookups, If/Then formulas, Goal Seek, 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 with senior management and partners
- 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
- Either a BS in business, finance, or comparable practical experience
- 2-5 years of work experience in technical analysis and/or the insurance industry
- Understanding of technical aspects in life insurance strategies a plus
- Knowledge of life insurance products, tax laws, and estate planning a plus

Work Setting/Demands/Complexity:

- Success and growth will require frequent work on weekends and/or evenings
- Success requires a strong fundamental skill set in the above areas on day one. This position provides a unique opportunity to apply and grow these skills in a highly productive, successful, and challenging environment.

To apply, please contact:

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