



INSURANCE ASSET MANAGEMENT

CASE STUDY - [INSURANCE ASSET MANAGEMENT \(HTTP://PATPATIA.SOURCE TOP.COM/WP-CONTENT/UPLOADS/2014/06/INSURANCE_ASSET_MANAGEMENT-1-3-2014.PDF\)](http://patpatia.sourcetop.com/wp-content/uploads/2014/06/insurance_asset_management-1-3-2014.pdf)

The Challenge

A leading life insurance company engaged Patpatia & Associates to enhance its general account investment management process for additional yield and diversification opportunities.

Patpatia & Associates' Activities

- Benchmarking of current investment organization based on competitive insights from insurance peers
- Determination of immediate investment opportunities for uninvested cash
- Formalization of a disciplined investment approach for rapid deployment of future capital in-flows
- Identification of alternative yield-enhancing asset classes and selection of appropriate third party money managers
- Development of a formal, liability-driven product pricing and investment strategy discipline
- Implementation of a formal enterprise risk management program & risk-adjusted performance analysis process

The Results

We executed a strategic business plan to enhance our client's general account investment performance. We assisted them in creating a formal approach, which significantly decreased existing inefficiencies in their investment program. We also helped deploy assets into several new disciplines utilizing a combination of internal resources and best of breed third party managers.