

Case Study: Insurance Asset Management

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.