

## Problem

This life insurance organization was seeking an expert to assist with the preparation of the company's five-year financial plan, **a multi-step process requiring buy-in from key stakeholders.**

## Response

Jacobson provided a consultant with **a strong background in actuarial modeling** utilizing TAS, MoSes, Prophet and MG-ALFA. He also offered skills in Microsoft Excel and VBA, which were **critical to the project's success.**

Our consultant ran MG-ALFA models, processed the outputs in a Microsoft Access database and then imported the results into a structured collection of Excel spreadsheets. He ran several iterations of the financial plan to test potential results. Once the company's stakeholders agreed upon a baseline version, our consultant ran various sensitivities through the system and delivered the results to our client's financial planning and analysis team.

## Solution

With his deep experience and extensive actuarial skill set, our consultant was able to **provide the client with many "what if" iterations of their financial plan.** This allowed the management team to better understand the reinsurance captive results of their core line of business.

Actuarial

# Financial Planning Actuary

### Client Type:

Life Insurance Provider

### Project Scope:

Financial Plan Creation

### Duration:

6 Months

### Team Size:

1 Full-Time Consultant