

Financial Reporting Expert

Client Type:

Life Insurance Company

Project Scope:

Financial Reporting

Duration:

2 Years and 1 Month

Team Size:

1 Full-Time Consultant

 **Problem**

Our client, a mutual life insurance company, was having issues delivering **timely and accurate reporting** for their \$6 billion life insurance subsidiary in Mexico.

 **Response**

Jacobson placed a consultant with **20 years of progressive experience in insurance accounting and financial reporting** as a CPA, MBA and FLMI. Our single consultant replaced two full time open positions. Additionally, the expert provided support in completion of the quarterly controller's book for the insurance division.

 **Solution**

Our expert was instrumental in **consistently meeting the monthly and quarterly financial reporting deadlines**. He managed the annual audited financial statement footnote process and reviewed and signed off on MAR/SOX internal controls for the Mexico operating subsidiary. The consultant also **achieved cost savings for the client** by coordinating the development of accounting desk procedures for efficient knowledge transfer to the outsourcing vendor team.

