

Problem

This life carrier needed a credentialed valuation actuary to assist with the **second quarter audit and financial reporting**. Specifically, the client was seeking assistance with tax, stat, GAAP and IFRS. To accomplish this, the company hoped to travel a consultant in to complete quarterly statement filings by mid-August.

Response

Jacobson provided a **tenured FSA with 18 years of industry experience**. This individual had a background in domestic and international statutory reporting and regulatory compliance. Our consultant was also proficient in various software packages (AXIS, PolySystems, ALFA, Prophet, and Moses), including the platform this life carrier was using.

Solution

The expert Jacobson provided met the client's deadline with a dedication that **prompted the client to extend the assignment for four additional months** in order to assist in year-end valuation work. Our consultant's value-add and expertise **triggered the client to extend the project a second time** to assist with modeling and a system conversion.

Actuarial

Valuation Actuary

Client Type: Life Carrier

Project Scope: Audit and Financial Reporting

Duration: 10 Months

Team Size: 1 Full-Time Actuary

