



STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST

Most Requested Services

Investment Process Value Chain	Major Benefits
Investment Policy ‘Best Practices’ Review	Peace of mind that policy is most appropriate for insurer
	Protection from problems experienced by other insurers
Strategic Asset Allocation	Improved bottom line from allocation balanced with sound risk management
	Achievement of set of decisions crucial to improve financial performance
Peer Group Analysis	Investment decisions linked to bottom line results
	Develop optional strategies for consideration
Portfolio Benchmarking	Manager behavior is focused to match corporate goals
	Strategic asset allocation reflected in benchmarks



STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST

Most Requested Services

Investment Process Value Chain	Major Benefits
Investment Management Responsibility and Evaluation	<ul style="list-style-type: none">Utilize proprietary database of specialized investment managersAccess to unique knowledge of external and internal investment management process
Portfolio Monitoring	<ul style="list-style-type: none">Profit from proprietary ‘early warning’ toolsImproved portfolio management using a proactive, cooperative approach
Performance Measurement	<ul style="list-style-type: none">Understand the ‘whys’ behind performanceMeasure portfolio performance from the perspective of required income, benchmark, risk adjusted, after tax and after fee returns
Quarterly Investment Review	<ul style="list-style-type: none">How are we doing?How can we do better?Where are the potential problems?



STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST

Most Requested Services

Overview Services	Major Benefits
■ SWOT Analysis	■ Development of a blueprint and prioritization of how and where to improve the investment process
■ Fiduciary and Governance Review	■ ‘Wellness check’ of investment process or strategy ■ Peace of mind for Board that existing structure and process is appropriate
■ Board of Directors Education	■ Improved understanding of the insurance investment process for Directors
■ Rating Agency Consulting	■ Improved rating agency results



STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST

Most Requested Services

Selected Proprietary Analytics	Major Benefits
■ Dynamic Financial Analysis	■ Determine strategic asset allocation that provides the highest risk adjusted financial results ■ Focus on your company's key measures of performance ■ Develop a customized analysis that simultaneously considers both sides of the balance sheet, business strategy, reinsurance, capitalization, etc.
■ Portfolio Credit Review	■ What is the probability distribution of credit losses? ■ What is the lost investment income probability distribution due to credit losses? ■ Which securities are the greatest contributors to expected loss distributions?
■ Other Than Temporary Impairment Review	■ Which securities are most likely to become impairment problems in the future? ■ What is the probability distribution of expected impairment?