

Focused

Insurance Core Curriculum

Strohm Ballweg



CPAs and Consultants
to Insurers Nationwide

Helping You Focus on What's Important



In today's marketplace, insurance companies face more challenges than ever before. To succeed, you need more than just sound marketing analysis and shrewd underwriting. You also need an experienced team of accountants and advisors—people with specific insurance knowledge and skills to help you respond to challenges and assess new opportunities.

We provide this kind of team. As a niche CPA firm dedicated to the insurance industry, we serve over 100 insurance entities with a unique blend of technical expertise and personalized, responsive, hands-on service. We know and understand the insurance regulatory environment and the specialized requirements of the industry. Because of the focused work we do with insurers, we are nationally recognized as one of the top CPA firms serving the insurance industry by A.M. Best, State Insurance Departments, and numerous other insurance specialists.

Let us put you in touch with some of our clients so you can hear directly from them how we have made a difference.

In addition to insurance audit, tax, and consulting services, Strohm Ballweg provides a comprehensive curriculum of training services to the industry. We call it our “Insurance Core Curriculum”.

Statutory Accounting 101

Introductory training on insurance accounting & reporting

- Insurance terms and concepts
- Bookkeeping and financial reporting
- Statutory vs. GAAP differences
- Introduction to reinsurance accounting and contracts
- Easy analytics and key ratios

Statutory Accounting 201

Understanding key financial components of insurance operations

- Premium
- Losses
- Reinsurance
- Investments
- Expenses
- Capital and surplus

Board Members

What Boards should know

- Understanding a statutory financial statement
- Corporate governance
- Strategic planning
- Enterprise risk management
- Questions to ask management, the auditors, and other service providers

Quarterly/Annual Statement Preparation

An overview on statement preparation and an understanding of specific schedules and supplemental filings

Income Taxes—Current and Deferred

Fundamentals of insurance taxation

- Preparation of the current year tax accrual
- Determination of deferred income taxes and evaluation of an admitted asset
- Preparation of income tax returns
- Computing estimated payments

Microsoft Office—Word and Excel

We cover the Microsoft Office skills, either basic or advanced depending on your needs, that will help you achieve your Company's reporting goals.



We are passionate about providing exceptional client service, so we are constantly striving to improve. In a recent survey of our clients, on a scale of one to five, they responded with an average score of 4.94 when asked:

- Is our staff professional?
- How satisfied are you with our services?
- Would you recommend our Firm to others?

Strohm Ballweg is involved in the insurance industry, participating in IASA, NAIC, NAMIC, AFA, and NOLHGA, so we are aware and informed of developments that affect insurers.

Contact us for pricing and training location options.



CPAs and Consultants
to Insurers Nationwide

PHONE: 608-821-0600

EMAIL: cbossingham@strohmballweg.com

www.strohmballweg.com





Strohm Ballweg

CPAs and Consultants
to Insurers Nationwide

9701 Brader Way • Suite 301
Middleton, WI 53562



The Strohm Ballweg difference is clear in...

- Our focus on serving only insurance companies
- Our passion for client service
- Our dedication to providing an experienced, energetic, and responsive service team
- Our commitment to be the best at the services we provide