CORNERSTONE FINANCIAL CONSULTING of RAYMOND JAMES

CFC

STRENGTH & EXPERIENCE

Cornerstone Financial Consulting (CFC) founder, Robert Burghart, first began working with reinsurance companies back in 1999 when he assisted a service contract company with the development and implementation of its CFC program.

Today, Cornerstone Financial Consulting has grown to include a full team of experienced and credentialed professionals who work together, applying their individual areas of expertise in the reinsurance arena.

Whether you are just starting a reinsurance company for the first time, or reviewing your fees, performance and service on multiple companies, we stand ready to provide the experience, expertise and resources to best serve you.

WHY DO I NEED ACTIVE MANAGEMENT?

Most trust agreements have similar investment covenants and restrictions. The design of these programs are so insurers may transfer portions of risk portfolios to other parties by some form of agreement in order to reduce the likelihood of having to pay a large obligation resulting from an insurance claim. All of the investment income is kept by the reinsurance company, so the ceding insurance company may be better preserved by a conservative investment strategy. By our team actively managing the investments in the trust, we will look to find market inefficiencies that should allow for an enhanced overall return to the reinsurance company while maintaining the conservative and approved investment policy in accordance with the trust agreement.

OUR TEAM

Robert Burghart, MBA, CIMA	Senior Vice President, Investments
Josh Aylesworth, CFP	First Vice President, Investments
Matt Stanley	Financial Advisor
Kristin Seed	Registered Sales Associate

OUR COMPETITIVE ADVANTAGES

- Over 16 years of experience dedicated to the management of investments for reinsurance companies
- We are independent from the trust company and custodian, working on your behalf
- Discounted fee schedule based on aggregate assets
- Complete fee transparency
- Streamlined account opening process for both reserve trusts and surplus accounts
- Advanced analysis and reporting tools to assist in the design and implementation of an Investment Policy
- Relationships with approved banks and trustees

REINSURANCE IS OUR PRIMARY FOCUS

For more than 16 years, we have been dedicated to managing investments for reinsurance professionals, applying advanced analysis and reporting to assist in the design of their investment policies. Many clients initially assume they could just ask their personal financial advisor to assist them with the management of their reinsurance company assets. We know better. The complexities and intricacies of reinsurance is no place for anything less than an experienced professional.

We believe it is best to count on an experienced financial team that understands insurance industry regulations, how to maximize the investment policy for companies that must manage the details and restrictions of trust agreements and offshore entities.

At Cornerstone Financial Consulting, you can expect to receive more responsive service and customized reporting, and enjoy a more satisfying client experience.

www.cfcinvesting.com

480-348-3988

Cornerstone Financial Consulting of Raymond James | 7702 E Doubletree Ranch Road Suite 300 Scottsdale, AZ 85258