

CapVisor Associates

As a recognized leader in Insurance Asset Management Consulting, we are employee owned and unaffiliated with firms that manage money for our clients. By separating “investment consulting” from “investment management”, we advise on a client’s investments only. In this way CapVisor seeks to avoid the conflicts inherent with providing advice and then implementing that advice. We are trusted by our clients to provide them with fair and balanced investment advice. We are an SEC-registered Investment Advisor with over 150 years combined experience that works with insurance companies.

[Learn more » \(case-studies.html\)](#)



Insurance Solutions

View details ([case-studies.html](#)) to see our full and varied selection of insurance solutions, including consulting and custom analysis.

How well is our portfolio manager doing?

Is our Asset Allocation Optimal?

Is our Investment Plan documentation truly reflective of our company's financial position?

Insurance Asset Management

We correlate your investment strategy with your business objectives and risk tolerance, and anticipate changes in your circumstances and securities market trends in order to maximize risk-adjusted return and protect portfolio principal and liquidity. We utilize Asset Liability Management (ALM) techniques and use a component approach to align assets with company structure.

[View details » \(case-studies.html\)](#)

Serving Insurers across industries

Property & Casualty

US Mutual Insurers (NAMIC Members, et al.)

US Commercial Insurers (Stock Companies)

Off-Shore Insurers

Alternative Risk Vehicles (P&C and Life)

Captives

Risk Retention Groups

Cell structures and rent-a Captives

Self Insurers (SIIA Members, et al.)
Risk Pools
Other, Run-offs, decommissioning trusts, etc.

Life & Health

US Mutual Insurers (NAMIC & PCI Members, et al.)
US Commercial Insurers (Stock Companies)
Off-shore Insurers

The CapVisor Philosophy

We have learned in over 140 years of combined insurance/investment industry experience that our service is best provided by ensuring:



Full Cycle Service

We serve clients throughout the whole process, from start to finish. We offer support across investment planning, manager selection and program monitoring to allow our clients to focus on what really matters.



Centralized control and accountability

Our client servicing model has been perfected over years of experience in the industry. Our small, highly specialized and dedicated team ensures that every client will have an individualized, highly accountable service.



Advice that avoids typical conflicts and biases

We are an independent employee owned insurance investment advisory firm providing comprehensive fair and balanced advice in a fiduciary capacity. Our focused team of experts is drawn from across the insurance industry with a goal to help our clients optimize their investment results.

CapVisor Associates

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