



Your Partner for Captive Entities: Assured Compliance, Financial Strength, and Operational Efficiency

Navigating the complexities of the captive insurance industry requires more than expertise — it demands a partner who understands the unique challenges of audits and compliance and is committed to your success. Leveraging specialized expertise in audit, tax, and advisory services for captive insurance entities, our advisors ensure you stay compliant, informed, and ready for what's next.

We work alongside your organization to streamline regulatory, accounting, and financial functions efficiently and strategically. Get the level of service you need to adhere to industry standards and regulatory requirements while maintaining the integrity of captive insurance arrangements.

Experienced Audit With a Variety of Entity Structures

- Risk Retention Groups
- Pure Captives
- Member Captives
- Micro Captives
- Insurance Trusts
- Reinsurance Companies
- Reciprocals
- Government Risk Pools
- Nonprofit Insurance Companies
- Multiple Employer Welfare Arrangements



More Than Compliance: Strategy

Customized Audit & Reporting

Our team of experts understands the complexities of GAAP and statutory standards, and the accounting principles that govern your organization. We know that our clients benefit from a customized audit designed to fit their unique risk profiles.

A Trained Eye on Future Tax Changes and Implications

- Federal and state income tax preparation
- Preparation and review of quarterly and annual tax provisions
- Foreign reporting compliance
- Uncertain tax position documentation
- Reportable transaction disclosure statements
- Taxing authority examination representation
- Change of accounting method requests
- Tax planning and consulting

Instilled Confidence From Reliable, Knowledgeable, and Accessible Compliance Consultants

- **Industry-recognized professionals** with decades of experience and a commitment to continued education
- **Collaborative advisors** that act as an extension of your team
- **Tailored solutions** designed to reduce burden and increase efficiency

Acting as a Critical Branch of Your Captive Insurance Program

Operating as an alternative practice structure, we combine the strengths of an independent CPA firm (KCoe Isom, LLP) and specialized consulting firm (Pinion, LLC) to deliver comprehensive solutions while maintaining independence and objectivity. Reach out to discuss your needs and how we help companies like yours:

Contact:

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