

## Your Partner for Strategic Solutions in the Insurance Industry

A unique blend of Insurance Services



### Merger & Acquisition Services

- Meticulous planning and due diligence
- Perform insurance advisory services
- Oversee and review a block or company
- Assumption reinsurance implementation
- Data/system conversions
- Assist with compliance filing and/or licensing expansion



### Actuarial Consulting

- Insurance company appraisals
- Annual cash flow testing
- Life and health (blue book) exhibits and schedules
- Automate reporting solutions and routine processes
- Perform financial reporting, analysis and examinations
- Assist with market conduct exams
- Evaluate reinsurance treaties and transactions



### Technology Solutions

- System conversion and data migration
- Project management
- Software planning and development
- Identify and implement automation
- Recurring data feeds
- SQL query optimization
- Assess 3<sup>rd</sup> party solutions for business compatibility
- Evaluate systems for enhancement or replacement

### Success Stories

Jill and Kevin are excellent partners...Blue Trident Group leveraged their many years of experience and technical expertise to help us develop and execute a multi-pronged strategy...[\[Read more\]](#)

**Nik Lewer, SVP**  
The Lewer Companies

"Having collaborated with Kevin and Jill on numerous insurance M&A ventures...Blue Trident Group is the indispensable ally you need on your team. [\[Read more\]](#)"

**John Scott**  
Fletcher Financial

"We worked with Blue Trident Group during the acquisition of two blocks of business...I would strongly recommend BTG!. [\[Read more\]](#)"

**Jeff Brown, EVP & COO**  
US Alliance Life and Security Company