

Don't rely on others to analyze insurance company financial performance for you.

Gain the *knowLEDGE* you need to stay ahead!

Who should attend this program?

This program is intended for professionals who have a solid foundation in insurance accounting and finance, including:

- Analysts
- Credit providers
- Fund managers
- Insurance operating management
- Competitive intelligence users
- Regulators
- Rating agency staff
- Operating management staff with budget or planning responsibilities

Earn up to 13 CPE credits from NASBA!

Earn CRE credits from SOFE!

Highline Data provides ongoing educational support to all participants. Call or email your instructor with follow-up questions regarding material covered during your class absolutely FREE!



877-299-9424

Cut through the competition with sharper analytical skills.

Advanced Financial Analysis of Life Insurance Companies

COURSE SUMMARY

This advanced two-day program presents techniques for forecasting the financial performance of Life insurance companies based on past performance and anticipated future economic variables. The objective is to achieve specified financial targets by manipulating activity inputs. Work is undertaken in teams, and a laptop is required. Participants use their understanding of how financial and industry variables impact company action to project future results.

Participants are assumed to have a mastery of insurance industry financial operations and analysis prior to beginning this program. This knowledge can be gained from our program, Operational Financial Analysis of Life Companies, or through industry experience.

Program Content

- Understanding the sample company
 - Lines of business
 - Reserve adequacy
 - Financial performance
 - Restraints/targets
- Review of forecasting model
 - Model operation
 - Outputs
 - Goals/Targets
- Model initiation
 - Data input – base results
 - Verification process/balancing
- Forecast development
- Activity decisions
- Data input
- Result generation
- Result review
 - Incurred loss techniques
- Actual vs. forecast
- Discussion of results
- Ratio analysis
- Second forecast development
 - Activity decisions
 - Data input

How to Register

Phone: 877-299-9424 or 617-441-5976
(9:00 am to 5:00 pm Eastern time)
Fax: 617-812-5891
Email: PDF form to crogers@highlinedata.com
Online: www.HighlineData.com/EducationServices
Mail: Highline Data Education Services
One Alewife Center, Suite 460
Cambridge, MA 02140

CONTINUING PROFESSIONAL EDUCATION CREDIT (CPE)

RECOMMENDED CPE CREDITS

Advanced Financial Analysis of Life Insurance Companies... 13 credits

Credits are in: Accounting
Prerequisites: Intermediate understanding of the insurance industry.

Advanced Preparation: None
Instructional Method: Group/Live
Course Level: Advanced
Course Objective: Understand how to assess the financial strength of a Life insurance company.



NASBA CPE Sponsor Registry Number: 103023.

Summit Business Media is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE

Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the: National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: www.nasba.org.

CPE Credits For The State of NY:

CPE credits for this meeting are in Accounting.
Sponsor #:000215 Recommended credits:
See NASBA information above.



CRE Credits All Highline Data Education Services programs are approved by the Society of Financial Examiners (SOFE) for Continuing Regulatory Education credits for the following certifications: Accredited Financial Examiner (AFE ©), Certified Financial Examiner (CFE ©), and Automated Examination Specialist (AES ©).

CONTINUING EDUCATION CREDITS:

After attending, I wish to receive credits for

CPE CRE in the state(s) of _____

Please request credits when registering.

YES! Please register me for *Advanced Financial Analysis of Life Insurance Companies*, November 4-5, 2009; New York, NY.

Name: _____
Last First MI

Title: _____

Company: _____

Address: _____
Street

City State Zip

Phone: _____ Fax: _____

Email: _____

Signature: _____

Payment Information (Payment due in full prior to course start date.)

Registration \$1,195
Less 10% Early Registration Discount \$ _____
If Registered by September 30

Less Additional Discount: _____ %
Discount % Discount Amount Discount Code

Total Amount Due: \$ _____

Pay by Check (Please make checks payable to Highline Data. Indicate participants' name on memo line of check. Submit check alongside this registration form.)

American Express Visa Mastercard

Card No.: _____ Exp. Date: _____

Name on Card: _____
Print Name

Billing Address: _____
Street

City State Zip

Signature: _____
Sign Name Date

Discount Policy Participants who register by the early registration deadline, or who register with one or more colleagues for the same session, or who register for more than one course at the same time are eligible for additional discounts. Please call (877) 299-9424 for details.

Cancellation Policy Courses will be refunded in full (less a \$200 administrative fee) until 30 days prior to the course start date. Courses will be refunded at 50% 16-29 days prior to the course start date. We regret that no refunds may be granted fewer than 16 days prior to the course start date. Participants unable to attend a course for which they have registered are welcomed to send a replacement from their companies. Highline Data does not accept any responsibility for covering airfare, hotel, or other expenses incurred by participants. Highline Data reserves the right without further liability to cancel a program at any time, in which case all course fees will be refunded.

Transfer Policy Participants who wish to change their originally registered course to another course date or topic area will be allowed to do so, room permitting. Every course change will incur a \$200 administrative fee. Excluded from this fee are participant substitutions from the same company for the same course date.

Accommodations Participants are responsible for making their own transportation and hotel arrangements. For hotels in close proximity to our venues, please call 877-299-9424.

Questions For more information regarding our administrative policies such as concerns and refund, please contact our offices at 877-299-9424 or email crogers@highlinedata.com.