

Customized Investment Solutions and Support for Insurance Companies

For over 20 years, Madison Scottsdale has solely focused on insurance investment management. Our veteran team, led by professionals with experience as asset managers and insurance executives, works directly with investment committees to craft, install and refine customized portfolios.

We complement traditional portfolio management with asset allocation support, investment policy development, enterprise risk management metrics, performance reporting/attribution and ongoing education. Additionally, clients work directly with their portfolio manager throughout their relationship with Madison Scottsdale.



Align Business Goals

We frame an investment strategy with the potential to support growth, manage asset risk in response to insurance operations and protect capital and surplus.

- Business growth
- Financial stability
- Surplus stability & growth
- Capital adequacy
- A.M. Best Rating

Quantify Investment Objectives

We identify and define the most important goals for managing each company's assets.

- Investment income & tax optimization
- Cash flow needs
- Total return
- Book yield targets
- ALM

Assess Risk and Constraints

We conduct a detailed review of practical constraints and guidelines that affect the investment portfolio and its implementation.

- Risk parameters
- Regulatory
- Accounting
- Tax
- Rating agency

Refine Investment Policy

We specify risk parameters and limits to govern overall investment strategy and execution.

- Duration targets & limits
- Credit quality
- Asset allocation (strategic & tactical)
- Benchmark selection
- Gain/loss tolerance

Craft Custom Portfolio

We assemble parts into a whole; managing risk and providing the best opportunity to achieve objectives.

- Taxable & tax exempt allocation
- Yield curve & duration management
- Asset class allocation/sector allocation
- Security selection
- Trade execution

Monitor and Report Performance

Our review mechanism efficiently ensures compliance, evaluates results and recommends changes.

- Continuous risk management
- Enterprise risk management
- Monthly & quarterly reporting
- Periodic calculations
- Custom benchmarks

Madison Scottsdale is the insurance asset management division of Madison Investment Advisors, LLC. Intended for insurance industry professional use only.

Schedule a consultation:

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