

# Insurance



## Do you have what you need to keep growing your business?

In a world of constant change, insurance companies face diverse business challenges: leveraging the right technology, striking a balance between pricing and underwriting, adapting to the evolving economic environment, maintaining compliance with regulations, attracting talent — the list goes on.

No matter your goal, you need a defined strategy to stay competitive and continue growing.

Wipfli can help you meet your challenges head-on. We bring decades of experience serving insurance companies and agencies, and the deep bench of our insurance team includes professionals across a wide range of specialties.

Do you need to replace aging systems and accelerate technology development? Let Wipfli help you put the right technology in place to get you in front of prospects and make your processes and people much more efficient. Is your business intelligence strategy paying off? With Wipfli, you can turn historical data assets into valuable insights.

Our holistic and growth-driven solutions help ensure your business's future success and longevity.

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# Meeting your challenges head-on

Wipfli provides a range of solutions tailored to the insurance industry:

## Accounting and assurance

Our accounting and assurance team can cover everything from statutory financial statement preparation to financial statement audits.

## Tax services

Our team helps you comply with federal, state and local tax requirements; assists you with premium tax and abatement; helps with ownership tax structuring; provides tax planning and more.

## Risk advisory

Let our team assist you with testing your internal controls and improving your control environment so that you can meet regulatory requirements under Section 404 of the Sarbanes–Oxley Act or Model Audit Rule.

## Cybersecurity and technology

Our team aligns technology with business strategy by helping you select, implement and integrate core systems while turning data into insights, connecting customer information and mitigating risk. We also provide extensive cybersecurity services, including vulnerability assessments, penetration testing and managed security services.

## Organizational performance consulting

From insights to action, our organizational performance consulting team partners with you to make your organization healthier, more agile and more valuable. We focus on people, strategy and operations to drive your business forward and optimize your performance.

## Human capital management

Wipfli can help you develop innovative compensation and benefits packages, implement robust payroll technology and build a retirement plan that helps employees navigate each milestone in their lives on the path to retirement.

## Mergers and acquisitions consulting

Whether you're looking to acquire other insurance firms or sell your company as part of your succession plan, Wipfli can provide valuation services, transaction consulting, due diligence, succession planning and more to help ensure successful mergers and acquisitions.

## Let's get started

Contact us to learn more about our solutions for insurance companies and agencies.

[wipfli.com/insurance](https://wipfli.com/insurance)