

Calling All Captive Insurance Companies

Is Your Investment Portfolio Positioned For Rising Interest Rates And Inflation?

Stephens works with captive insurance companies to craft risk managed portfolios that meet their company's specific business objectives.


Whether its capital preservation in the formative years or growth of your captive assets, Stephens has a multi-asset allocation strategy to fit your captive.

Stephens has advised captive insurance companies and their boards in the management of their investment portfolios for many years. We can help with the development of your investment policy statement to ensure compliance with insurance regulations in the domiciles of your captive. We work in partnership with your boards, and your captive manager to maintain compliance and regulatory filings.

If you would like to discuss how Stephens can assist your captive insurance company with its investment strategies, please contact:

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Our investment portfolios are structured to:



- 1 Provide liquidity for current expenses
- 2 Provide a foundation for healthy reserves to assure future claims paying ability
- 3 Provide financial stability and a vehicle to build future value

No matter where your captive is in its life cycle (surplus build, development, or mature) or where the balance of risk may lie (insurance vs. investment vs. regulatory), Stephens is there to assist as a trusted partner/advisor.

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