

INSURANCE | LIFE CARRIER | FINANCIAL REPORTING

A life carrier lost its AVP of Financial Reporting mid-close. We filled the seat in 21 days.

When the reporting calendar will not move, the search has to. We placed a Financial Reporting Director at a life insurance carrier 21 days after the engagement started, in the middle of an active quarter-end close.

INDUSTRY	FUNCTION	ROLE	MARKET	ENGAGEMENT	TIME TO ACCEPTED OFFER
Insurance. Life and annuity carrier	Finance and accounting	Director, Financial Reporting	New York metro	Retained executive search	21 days

THE SITUATION

A life insurance carrier in the New York metro area lost its AVP of Financial Reporting without notice, 3 weeks into quarter-end close.

The filing calendar did not move. Statutory reporting, GAAP consolidation, and the tax provision all ran through a seat that was suddenly empty, and the close was already in flight.

WHAT MADE IT HARD

- **STAT, GAAP, and tax in 1 person.** A life carrier runs all 3 through the same close. Candidates who have only done GAAP could not take this over.
- **No ramp.** Whoever took the job would inherit a close in progress, not a clean quarter.
- **Discretion.** The client did not want the vacancy visible to the market while filings were pending.

HOW WE RAN THE SEARCH

- 1 Scoped to life and annuity reporting first.** We built the target list from people who have run a statutory close at a life carrier. Industry before function, every time.
- 2 Sorted the market fast.** Our search filters and matching tools ranked more than 500 life insurance finance profiles in days. Our consultants then read every profile that surfaced, looking for the thing a filter cannot see: whether someone can walk into an open close and take the wheel.
- 3 Talked to people.** 40 substantive conversations across several outreach waves. The shortlist came out of those calls, not out of the rankings.
- 4 Submitted 5.** The client interviewed 3.

THE OUTCOME

Offer accepted 21 days after engagement. Onboarding started immediately.

The Director took over the close in progress and has run the reporting calendar since without a filing slipping.

BY THE NUMBERS

21 DAYS TO ACCEPTED OFFER	500+ PROFILES SCREENED
40 CANDIDATE CONVERSATIONS	5 / 3 / 1 SUBMITTED / INTERVIEWED / HIRED

WHY IT MATTERS

We moved in 21 days because we already knew the statutory reporting market in life insurance. The depth came first. The speed followed from it.

Ready to start a search?

We place finance, accounting, underwriting, and actuarial leaders at insurance carriers, MGAs, reinsurers, RIAs, family offices, and financial services firms. We have done it since 1993, and every retained search we have accepted has ended in a placement.

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