

insurance

The right expertise to insure your success.

Insurance is about anticipation. For insurance-related businesses, anticipating the impact of regulatory changes and evolving customer needs can mean the difference between success and failure. The right strategic partner can make the difference.

At Katz, Sapper & Miller, we serve a diverse group of insurance and insurance-related companies. Agencies, brokers, underwriters, captive insurers, and property and casualty companies turn to our experienced, insurance-focused practice for the breadth of our expertise and our commitment to their success.

Our specialized experts have an extensive, up-to-date knowledge of the issues, trends, and challenges insurers face. We combine multidisciplinary expertise with personalized attention to give small- and mid-sized companies the advice and attention they need to thrive.

OUR SERVICES INCLUDE:

Audit and assurance services

- Financial statement audits
- System and Organization Controls (SOC) reports
- Agreed-upon procedures
- IT assurance

Tax compliance and consulting

- Federal and state income tax preparation
- Consolidated return preparation and electronic filing
- Change of accounting method requests
- IRS exam representations
- Mergers and acquisitions planning
- Foreign bank report filings
- Tax planning compliance

