Insurance Tax Consulting and Compliance

Insurance companies operate in an increasingly complex environment, making timely, professional tax advice essential for success. Companies must remain in compliance not only with the regulatory requirements of their domiciles but also the unique tax framework for their industry, minimize risk and have a sustainable model amid regulatory changes. Additionally, they have unique tax needs, and we have seen an increase in corporate reorganizations and mergers.

The Insurance Industry Group at Brown Smith Wallace works at the frontlines of the tax issues the industry currently faces. We help clients navigate the bewildering tax landscape, and we pinpoint opportunities for growth and savings. We understand how the Tax Cuts and Jobs Act impacts insurance companies, so we take a comprehensive, proactive approach when learning about our clients and seeking out opportunities for their benefit. We can also help with due diligence and restructuring to minimize tax consequences associated with mergers.

Our team goes beyond compliance to provide exceptional expertise. We position our clients to meet today's demands and create a more profitable and enduring future.

We provide the following tax services for the insurance industry:

- Federal, State and Local Tax Planning and Compliance – including form 1120-PC and 1120-L, Voluntary Disclosures, Excise Tax Planning and Uncertain Tax Position
- Tax Internal Controls Review
- Insurance Premium Tax (IPT) Compliance
- Business Tax Services
- International Tax Services
- Transfer Pricing
- Indirect Tax
- Tax Management Consulting
- Accounting
Insurance Tax Consulting and Compliance Continued

- Mergers & Acquisitions
- Corporate Restructurings
- Research & Development and Government Incentives
- Tax Studies (Credits, Cost Segregation, Method Changes)

**Articles**

Top Concerns for Insurance Carriers During the COVID-19 Pandemic  
04.15.2020

IRS Issues Loss Reserve Discounting Guidance  
01.29.2020

M&A in the Insurance Industry: Trends and Strategies  
08.29.2019

IRS Guidance Offers Simplified Method Change for Insurers  
08.28.2019

Alan Fine Quoted in Missouri Captive Domicile Profile Summary on Captive.com  
05.16.2019

Impact of the Tax Cuts and Jobs Act on the Insurance Industry  
03.06.2019

**In The News**

Alan Fine Featured in Fourth Annual Captive Insurance Times Domicile Guidebook  
*Captive Insurance Times*, 04.22.2020

Alan Fine Discusses the IRS Settlement Offer for Captives and Future Implications  
*Captive.com*, 02.12.2020

Alan Fine Discusses Recent IRS Settlement Offer for Micro Captives  
*Captive.com*, 10.30.2019

Alan Fine Featured in Third Annual Captive Insurance Times Domicile Guidebook  
*Captive Insurance Times*, 04.12.2019

Alan Fine Discusses Reserve Mechanical Case and What Captives Can Learn  
*Captive.com*, 02.07.2019