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**Financial Sessions: Investment Advisory Investment Funds Finding Capital (.5 hour) - Group Live**

Panelists: Sandy Elsass,  
Jim Charnley, Water Street Advisers  
Steven Nigro, TAG Financial Institutions Group, LLC

Location: NRRRA 2013 National Conference  
Ritz Carlton, Pentagon City  
Washington, D.C.

**Wednesday, October 2<sup>nd</sup>, 2013; 3:45 PM-4:30 PM**

Register for this class today by emailing: [dkusaila@slbcpa.com](mailto:dkusaila@slbcpa.com) or call (860) 470-2122.

.5 CPE credits are available for completion of this program.

Many RRGs need additional capital to grow as the soft market has squeezed their premium to surplus ratios. Since investors, who are not insureds, cannot own stock/equity, RRGs have trouble finding traditional investors. This session will provide 3 short sessions within the one hour that will focus on potential capital available to RRGs and how financed; an innovative way to analyze smaller investment portfolios for better returns; and how to structure an investment into an RRG that makes for attractive returns to investors while the RRG prospers.

To inform the audience how to structure a plan that is attractive to traditional and strategic investors, where to look for those investors, what to do with additional capital once raised, and how to maximize returns on investment. The second goal is to teach a new way to evaluate their investment portfolio and grow it with new inflows.

After completing this course you will be able to:

- Analyze your need for more capital
- Explain where to look for it after you have developed a compelling business plan
- Describe how to negotiate terms that result in your RRG becoming more valuable to its shareholder insureds.

Program level: Basic

Prerequisites: None

Advance preparation: None



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