



LINDSAY CHASE

CPA, CPCU

PROFILE

- A Certified Public Accountant with 15+ years in insurance with expertise in captive insurance and insurance brokerage.
- Possess comprehensive knowledge in consulting clients with their understanding of all financial aspects of captive insurance including accounting, taxation, regulation, compliance, and operations.
- Proven management, financial oversight and budgeting skills.

CONTACT

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HOBBIES

Tennis
Sports
Travel
Family

WORK EXPERIENCE

Innovative Captive Strategies | Vice President of Finance

January 2018– Present

- Assist in the review and preparation of internal financial reporting including forecasting, budgeting, and tax and audit reporting.
- Responsible for strategic planning and vision of the company as a member of Executive Committee.
- Provide financial oversight of several divisions of parent Company as well as 50+ captive insurance companies.
- Develop, analyze, present, and consult prospective clients on the feasibility of captive insurance.
- Negotiate, is the liaison for, and builds and maintains business relationships with several financial partners including actuaries, auditors, tax advisors, attorneys, captive managers, and financial institutions.
- Supervise staff and assist with their professional growth and development.

Innovative Captive Strategies | Assistant Vice President of Finance

June 2011 to January 2018

- Developed and analyzed submissions for captive feasibility studies including the preparation of materials to the client.
- Responsible for the oversight of captive management on the consulting platform.
- Reviewed and prepared financial statements of captives.
- Monitored and ensured compliance with regulatory and tax requirements.
- Tracked, notified and implemented new accounting, tax, and regulatory reporting requirements that affect captives.
- Negotiated pricing with financial professional partners of the captives as required including audit, tax, actuary, captive management, and banking professionals.
- Tracked and reported on the internal revenue and commissions for sales staff.
- Supervised staff

Innovative Captive Strategies | Director of Finance

June 2008 to June 2011

- Facilitated the year-end audits for the captives including the completion of ICS audit confirmations.

- Prepared budgets and other financial projections for captives as required.
- Tracked, notified and implemented new accounting, tax, and regulatory reporting requirements that affect captives.
- Monitored and maintain financial partner relationships with the captives including audit, tax actuary, captive management, and banking professionals.

Innovative Captive Strategies | Financial Accountant

May 2006 to June 2008

- Planned and presented captive finance information to Board committees
- Facilitated finance committee meetings of captives
- Compiled, reviewed, and benchmarked fiscal year-end and interim financial statements for captives.
- Reviewed the captive financial and investment information at interim and year-end.
- Reviewed, analyzed, and benchmarked financial data of captives

KPMG | Audit Associate

July 2004 to May 2006

- Prepared and created detailed audit workpapers and spreadsheets
- Reviewed financial statement information and disclosures for clients
- Communicated detailed information to client personnel
- Researched and interpreted accounting literature

ADDITIONAL WORK EXPERIENCE

Simpson College | Head Women's' Tennis Coach

July 2008 to May 2015

- Provide training direction, encouragement, and motivation in order to prepare athletes for competition.
- Plan, organize, and conduct practice sessions.
- Develop and arrange competition schedules and programs. Recruited high school scholar-athletes to the college and program.

EDUCATION

Coe College, Cedar Rapids, Iowa

Graduation: May 9, 2004, Cum Laude

Majors: Public Accounting & Business Administration

Minor: Economics

CIVIC LEADERSHIP

- Board member and Treasurer of the Warrior Ridge Homeowners Association
- Vacation bible school volunteer at Lutheran Church of Hope
- Volunteer at Maple Grove Elementary School
- Captain for United State Tennis Association (USTA) League Team
- Member of Iowa Society of CPAs and member on Business & Industry and LEAP Committees
- Member of Holmes Murphy's Women Optimizing Women (WOW) Initiative
- Volunteer coach with Waukee Parks & Recreation and Vision Soccer Academy (VSA)
- United Way committee member for Holmes Murphy's annual campaign

SKILLS

- Presentation
- Finance
- Accounting
- Business Development
- Relationship Building
- Team Management
- Budgeting
- Problem Solving
- Negotiation
- Time Management
- Integrity

REFERENCES

Available Upon Request