



# THE INSURANCE DESIGN CENTER CAPITAL MANAGEMENT STANDARD™

## *Analytic Assessment*

Policy Valuation

Carrier Review

Market Study

Recommendation

THE CURRENT  
MARKET MATRIX™

## *Design Consultation*

Goal Identification

Underwriting

Funding Strategies

Settlement

THE CAPITAL  
VALUE BLUEPRINT™

## *Stewardship Services*

Portfolio Management

Administration

Advocacy

Policy Valuation

THE PRIVATE  
PORTFOLIO CONCIERGE™



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