



Captive Insurance 831(b) from a CPA Perspective

Course Details

Target Audience: CPAs

Delivery Method & Duration:

Instructor Led Group-Live; 2 Hours

CPE Credit & Primary Field of Study:

2 CPE Hours; Taxes and Accounting-Technical
Fields of Study

Prerequisites & Preparation: None

Program Level: Basic

Course Instructor: Ken Huffman, CPA

Course Fee when applicable:

\$20

Registration Information:

Advanced Registration is required.

Refunds, Cancellations & More:

For Registration, Attendance Requirements, Policies on Refunds, Cancellations, or Concerns, visit www.CPAtoCPA.com/CPE, email rsvp@cpatocpa.com, or call 888.973.1973.



CPA to CPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding

registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

TEXAS STATE BOARD OF PUBLIC ACCOUNTANCY

"CPA to CPA has entered into an agreement with the Texas State Board of Public Accountancy to meet the requirements of CPE rules covering maintenance of attendance records, retention of program outlines, qualifications of instructors, program content, physical facilities, and length of class hours. This agreement does not constitute an endorsement by the board as to the quality of the program or its contribution to the professional competence of the licensee." TSBPA Sponsor #010443

Program Description & Learning Objectives

This course presented by a CPA will present to CPAs, Business Owners, Attorneys, Insurance Agents, and Financial Advisers on Captive Insurance as a business strategy from a CPA's perspective. After completing this course, you will understand what a captive is, how a captive can cover gaps, exclusions, and deductibles in existing insurance policies which may not be readily available or too costly with typical commercial policies. In addition, the course will cover the importance of regulatory and compliance, reputable captive management services when considering the formation of a captive, and the tax and accounting impact the effectiveness of a captive has in managing the financial impact of risk.

Participants who successfully complete this course will be able to:

- Understand the main benefits of captive insurance;
- Recognize the risk management purpose of using a captive to finance an entity's risks, identify the elements of captive insurance, and recognize why a captive can insure many types of risks;
- Determine which of your clients will benefit with a captive insurance company;
- Recognize key differences between captives, commercial insurance, and self-insurance plans;
- Identify various types of exposures and possible coverages for the associated risks;
- Provide an overview of income tax considerations; and
- Provide an overview of the captive formation process, importance of regulatory and compliance, and reputable captive management services.

About CPA to CPA

CPA to CPA is a CPA firm that provides business and advanced tax strategies to and through CPA firms. We utilize multiple industries to obtain strategies for personal and business clients and provide them in an unbiased and safe environment of the CPA.