



Partnership at Work®

Why NEAM?

New England Asset Management (NEAM) strives to be integral to the success of our insurance industry clients by providing investment management solutions through a team of skilled professionals dedicated to delivering exceptional client service. We aim to build true, enduring relationships with our insurance company clients by combining three core attributes:

DEDICATED TEAMS

NEAM is staffed with dedicated teams of knowledgeable insurance and capital markets professionals.

ACTIONABLE TOOLS

Our combination of talent and technology is designed to support all aspects of your investment management.

TAILORED SOLUTIONS

We are acutely aware of the unique concerns and challenges you face on a daily basis and so these are reflected in our investment process.

At a Glance as of March 31, 2024¹



For more information please contact one of our New Business Development Professionals:

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¹ Figures represent aggregated assets, clients and personnel of both NEAM, Inc. and its affiliate, the majority of which are dedicated to NEAM, Inc. Insurance assets are unaffiliated, approximately \$69.2 billion of which are managed by NEAM, Inc. and the remaining \$4.3 billion of which are managed by NEAM, Inc.'s affiliate. Ten of the noted clients operate as insurance entities controlled or managed by State or Governmental entities.

Our comprehensive offering includes a wide range of services:

ASSET MANAGEMENT

For fixed income portfolios, our strategy seeks to maximize total returns – mindful of a designated risk level, and sensitive to your operating needs and income constraints.

ENTERPRISE CAPITAL STRATEGY

Our Enterprise Capital Strategy services provide the framework and key analytics to help achieve your financial goals by embracing:

- Capital structure and allocation
- Asset allocation
- Product mix and design
- Reinsurance structures
- Acquisitions and divestitures

CAPITAL AND RISK ANALYTICS (CARA®) PLATFORM

Insurance professionals need a portfolio that's transparent, accessible and tailored to meet their unique investment goals. NEAM's Capital and Risk Analytics (CARA®) platform is an integrated suite of capital and risk analytic applications that allow us to assist our clients with the various investment challenges they face within the insurance industry. We employ insurance focused investment risk management tools in the day-to-day management of your portfolio.

INVESTMENT ACCOUNTING AND REPORTING SERVICES

Each investment accounting client works with a dedicated Investment Accountant to help with account specific and industry related questions. Playing an active role in the overall Client Service team, our Investment Accountants are knowledgeable about each client's unique needs, enabling them to respond quickly to requests for most investment accounting and reporting information.



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