

STEPPING UP TO A SPECIALTY INSURANCE FIRM

A JLK Rosenberg Client Study



Since 2002, more than 30 insurance entities have transitioned from the large national firms to JLK Rosenberg because we provide a superior service experience. Lawyers' Mutual Insurance Company's CEO and CFO, in their own words, contrast the differences in their service experience with JLK Rosenberg and their former Big 4 firm.



1.

HANDS-ON PARTNER TIME

"We receive a more hands-on relationship with JLK Rosenberg compared to our prior Big 4 firm. In other words, the managing or supervising partner at our former auditor didn't spend much time at all with us."

2.

NO ROOKIES RUNNING THE SHOW

"JLK Rosenberg's staff is experienced with insurance companies and easy to work with. When we were with a Big 4 firm, if we were lucky, someone who had familiarity with our company would show up. Their usual method was sending in the "freshman" kids who had never been here before to run the show. Nothing against the youngsters coming in, but you should not have everyone new to the account each year."

3.

TIMELY REPORTS

"The audit performed by JLK Rosenberg is limited to 2-3 weeks and it goes smoothly. The reports are fast and on time."

4.

SPECIALIZED STAFF

"The people of JLK Rosenberg have a higher skill level, especially those on site each year. Our prior Big 4 auditor kept changing their staff and managers. They were difficult to work and talk with. They came up with the same questions over and over when they came to audit."

"The Big 4 firm tried to create the mystique of superiority which we feel is not accurate or correct. We prefer a specialized firm like JLK Rosenberg, serving California insurance companies, for better personal service."

Gary Davis, CEO

"Since engaging JLK Rosenberg, our audit time is better spent. The staff of JLK Rosenberg is more familiar with insurance and our company so their questions are better. They aren't guessing. I can do my job."

Anna Chiong, CFO

▶ To learn more about the benefits of an insurance specialty firm, contact:



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