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Greg Lebold

Helping Missouri's Mutual Insurance Boards Achieve Success:

- Facilitating access to Institutional Portfolio Management Tools & Expertise
- Managing Policyholder Surplus to Maximize Investible Assets
- Generating income during the Claims Reserve Process
- Avoiding Expensive Retail Investment Products by only using Institutional Investments
- Guiding the Development of Compliant Investment Policy Statements
- Continuously Monitoring & Adjusting Investment Program to Statute, Regulation & Board Requirements
- Providing Economic & Investment Intelligence Reports

Reserve Asset Monitoring Service®

Class of Investment	Assets in Class	Reserving Class Capacity	Percentage of Individual Investments	Tolerance of Class
U.S. Bonds	300,000	Unlimited	Within	Unlimited
Missouri Municipal Bonds	1,300,000	Unlimited	Within	Unlimited
Corporate & Other US State Municipal Bonds, Commercial Paper	1,400,000	252,722	Within	Within
Real Mutual Funds	-	277,000	Within	Within
Money Market Mutual Funds (Insured)	150,000	Unlimited/TDHC	Within	Unlimited/TDHC
Money Market Mutual Funds (Not Insured)	-	1,022,722	Within	Within
Money Market Deposit Accounts	70,000	Unlimited/TDHC	Within	Unlimited/TDHC
Certificate of Deposit & Other Deposit Accounts	00,000	Unlimited/TDHC	Within	Within
Reinsurance Agreements	-	-	None Assigned	-
Other Real Estate & Mortgage	-	-	None Assigned	-
Missouri REIT Real Estate	100,000	N/A	Within	Within



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Legacy's RAMS© tool. (See Above)
 allows Boards to monitor policyholder surplus to ensure that both individual investments and investment classes are within regulatory guidelines.

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A Fiduciary Helping Fiduciaries - CALL 816.454.0447 TODAY