



Matthew M. Rosendale Sr.
Commissioner of Securities & Insurance
Montana State Auditor
840 Helena Ave. • Helena, MT 59601
Phone: 406.444.2040 or 800.332.6148
Fax: 406.444.3497 • Web: www.csi.mt.gov

**State of Montana
Approved Captive Managers as of
November 16, 2017**

Active Captive Management, LLC

Frederick E. Turner, 16485 Laguna Canyon Rd., Ste. 200, Irvine, CA 92618
(949) 727-0155, mmckahan@activecaptive.com

Advantage Insurance Management (USA), LLC

Les Boughner, 177 Meeting St., Ste. 470, Charleston, SC 29401
(800) 800-4324, l.boughner@aihusa.com

Alta-Montana Captive Management, LLC

Donald B. Rousso, 179 W. Winchester St., Murray, UT 84107
(801) 993-2102, drousso@altaholdings.com

Artex Risk Solutions, Inc.

Brittanni Norbut, 1635 N. Greenfield Rd. Ste. 127, Mesa, AZ 85205
(480) 718-2140, brittanni_norbut@artexrisk.com

Atlas Insurance Management

Martin Eveleigh, 7401 Carmel Executive Park, Ste. 305, Charlotte, NC 28226
(704) 945-6620, meveleigh@atlascaptives.com

Captive Planning Associates, LTD

John Capasso, 750 Route 73 South., Ste. 105B, Marlton, NJ 08053
(609) 714-8889, jcapasso@captiveplanning.com

Consensus Management Corporation

Kelly Casey, 4301 Hillsboro Pike, Ste. 310, Nashville, TN 37215
(866) 216-7433 Ext. 216, kellyc@consensusmgmt.com

Craford Captive Management

Tony Williams, 990 Fifth Ave., San Rafael, CA 94901
(415) 456-9790, twilliams@craford.com

Definitive Insurance Mgmt Services, Inc.

Bill Megna, 196 Princeton-Hightstown Rd., Bldg. 2, Ste. 14A, Princeton Jct., NJ 08550
(609) 378-5482, wmegna@define-ins.com

Fenix Concepts, LLC

Derek J. Burdsall, 2424 North Cavalry Trail Ste A, Tucson, AZ 85749
(520) 777-4906, dburdsall@fenixconcepts.com

GPW and Associates, Inc.

Charles A. Wanner, 2700 N. Third St., Ste. 3050, Phoenix, AZ 85004
(602) 200-6900, cwanner@gpwa.com

HUB International

Lynn Desmone, 210 Sixth Avenue, Pittsburgh, PA 15222
(412) 992-1841, lynn.desmone@hubinternational.com

Innovative Captive Strategies

Jessica Heil, 108 Crestview Dr., Ste. A, Bigfork, MT 59911
(406) 282-0170, jheil@yourcaptive.com

Intuitive Captive Solutions, LLC

Rick Eldridge, 8400 E. Prentice Ave., Ste. 645, Greenwood Village, CO 80111
(720) 382-2100, reldridge@intuitivecompanies.com

JLT Towner Insurance Management

Guy Ragosta, 148 College St., Ste. 204, Burlington, VT 05401
(802) 861-2930, info@jlttowner.com

Kane (USA), Inc.

Carlos A. Oliveras, 23 Rossimur Court, Wilton, CT 06897
(203) 563-9779, carlos.oliveras@kane-group.com

Marsh Management Services Inc.

Julie Boucher, 100 Bank St., Ste. 610, Burlington, VT 05401
(802) 864-5599, julie.s.boucher@marsh.com

Pacific Risk Solutions, LLC

Tony Schmidt, 2897 Kalawao St., Honolulu, HI 96822
(808) 988-3215, tschmidt@pacificrisksolutions.com

Perr&Knight

Tim Perr, 881 Alma Real Dr., Ste. 205, Pacific Palisades, CA 90272
(310) 230-9339, tperr@perrknight.com

Premium LLC

Jeff Moffat, 836 Holt Dr Ste 235, Bigfork, MT 59911
(818) 599-1872, jmoffat@premiumcaptive.com

Strategic Risk Solutions (West), Inc.

Ann W. Wick, 18835 N. Thompson Peak Parkway, Ste. 210, Scottsdale, AZ 85255
(602) 903-0318, ann.wick@srsmail.com

The Taft Companies, LLC

Mary Claire Goff, 1620 Providence Rd., Towson, MD 21286
(877) 587-1763, MCG@taftcos.com

USA Risk Group, Inc.

Andrew Sargeant, 2386 Airport Rd., Barre, VT 05641
(800) 872-7475, asargeant@usarisk.com

Willis Towers Watson Management (Vermont) Ltd.

Jason Palmer, 100 Bank St. Ste. 500, Burlington, VT 05401
(802) 648-9466, Jason.palmer@willistowerswatson.com