

Commissioner of Securities and Insurance

Troy Downing
Commissioner



Office of the
Montana State Auditor

State of Montana Approved Captive Managers as of November 15, 2021

Active Captive Management, LLC

Frederick E. Turner, 25361 Commercentre Dr., Ste. 150, Lake Forest, CA 92630
(949) 727-0155, mmckahan@activecaptive.com

Advantage Insurance Management (USA), LLC

Les Boughner, 12 Gillion St., Charleston, SC 29401
(312) 315-3166, l.boughner@aihusa.com

Artex Risk Solutions, Inc.

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

Atlas Insurance Management

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

Beecher Carlson Insurance Services, LLC

Pete Kranz, 156 College St. #301, Burlington, VT 05401
(802) 658-7834, pkranz@beechercarlson.com

Capstone Insurance Management, Ltd.

Stewart Feldman, 1980 Post Oak Blvd., Ste.1950, Houston, TX 77056
(713) 800-0550, sfeldman@capstoneassociated.com

Captive Insurance Group, Ltd.

Charles Spitzer, 212 W. Main Street, Arlington, TX 76010
(817) 793-6522, cspitzer@captiveinsuranceusa.com

Captive Planning Associates, LTD

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

Cedar Consulting, LLC

Dennis Silvia, 7181 Chagrin Rd., Ste. 100, Chagrin Falls, OH 44023
(440) 264-9992, dennis.silvia@cedarconsulting.net

CIC Services, LLC

Bryan Ridgway, 1111 N. Northshore Drive, Ste. N-325, Knoxville, TN 37919
(865) 248-3044, bryan@cicservicesllc.com

Consensus Management Corporation

Kelly Casey, 4301 Hillsboro Pike, Ste. 310, Nashville, TN 37215 (866) 216-7433
Ext. 216, kellyc@consensusmgmt.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, 304 Lookout Dr., Rising Fawn, GA 30738
(520) 820-1059, dburdsall@fenixconcepts.com

GPW and Associates, Inc.

Lawrence Prudhomme, 3101 N. Central Ave., Ste. 400, Phoenix,
AZ 85012, (602) 200-6900, lprudhomme@gpwa.com

ICG Captive Services, LLC

Andrew Rhea, 401 Commerce St., Ste. 740, Nashville, TN 37219
(615) 467-7211, arhea@icgcaptive.com

Hylant Global Captive Solutions

Dawn Dinardo, 8 Cadillac Dr., Ste. 230, Brentwood, TN 37027
(615) 732-6538, dawn.dinardo@hylant.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

Kane (USA), Inc.

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

KeyState Captive Management, LLC

David Guerino, 100 Main Street, Suite 1, Burlington, VT 05402
(802) 316-4333, dguerino@key-state.com

Marsh Captive Solutions

Chris Varin, 463 Mountain View Dr., Ste. 301, 3rd Floor, Colchester, VT 05446
(802) 864-5599, chris.varin@marsh.com

NFP Management Corp.

Jonathan McKenzie, 620 Hinesburg Rd., South Burlington, VT 05407
(800) 356-8787, jonathan.mckenzie@nfp.com

Orion Risk Management Insurance Services, an Alera Group Insurance Agency, LLC

Alan Ruben, 1800 Quail St., Ste. 110, Newport Beach, CA 92660
(949) 502-0851, aruben@orionrisk.com

Pacific Risk Solutions, LLC

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

Pegasus Captive Management, LLC

Donald B. Rousso, 1878 West 12600 South #503, Riverton, UT 84065
(949) 836-2279, drousso@pegasuscaptive.com

Perr & Knight

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

POPIC Management, LLC

Noah Molnar, 665 West 17th St., Costa Mesa 92627
(949) 662-5478, nmolnar@ppopicllc.com

Premium LLC

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

Quest Captive Management LLC

Jeff Kenneson, 135 Allen Brook Lane, Suite 101, Williston, VT 05495
(802) 578-5755, jeff.kenneson@questgroup.bm

Risk Partners

Gary Osborne, 444 E. Kings Hwy., Ste. 100, Maple Shade, NJ 08052
(516) 658-6829, Gosborne@riskpartners.com

Risk Services, LLC

B. Troy Winch, 1605 Main St., Ste. 800, Sarasota, FL 34236
(941) 373-1105, twinch@pboa.com

Risk Strategies Captive Practice

Tony Williams, 140 2nd St., Ste. 318, Petaluma, CA 94952
(415) 755-6324, twilliams@risk-strategies.com

Somers Risk Consulting, LLC

Kathryn Marsh, 1428 Old Rosebud Trail, Awendaw, SC 29429
(770) 286-7551, kmarsh@somersriskconsulting.com

Strategic Risk Solutions (West), Inc.

Ann W. Wick, 20860 N. Tatum Blvd., Suite 260, Phoenix, AZ 85050
(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

Willis Towers Watson Management (Vermont) Ltd.

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