



PRESERVATION
SERVICES

Preservation Case Study

Protect Your Business. Ensure Your Future.

At a glance

With over 15 years of self-insurance experience and proven financial results, Preservation Services protects you and your client's business.

THE CHALLENGE

- A Successful Builder
- Builds 700 Homes/year
- Pays \$1,000,000/year
 - General Liability Insurance
 - No Other Coverage

THE PRESERVATION SOLUTION

- Same Successful Builder
- Deposits \$1,175,000+ into His Bank Account (tax-deferred)
- Retains All Coverage from Third-Party Insurers
- Pays Less Premiums to Traditional Carrier



**Innovative,
Customized
Policies**



**Protect Your
Business, Ensure
Your Future**



**Reduce Total
Insurance Costs**

BENEFITS

1

Lowered Premium

With a higher self-insured retention or deductible, premiums paid to traditional carriers should be reduced.

2

Lowered Tax Liability

All premium paid to Captive insurance is considered pre-tax reserves.

3

Better Coverage for Losses

Traditional exclusions become Preservation inclusions. "Fine Print" in traditional policies excludes coverage. A Preservation policy includes the "Fine Print".

BEFORE	AFTER
General Liability Premium	
\$555K	\$488K
Self-Insured Retention	
\$250K	\$500K
Annual Aggregate Limit	
\$2M	\$2M
Approved Captive Premium	
\$0	\$1.564M



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