

# Case Study

## GLOBAL EMPLOYEE BENEFITS

### PARTNER PROFILE

#### ORGANIZATION

One of the world's leading impact investment funds

#### ORGANIZATION SIZE

Over \$1 billion in assets under management

#### GEOGRAPHIC SCOPE

Operates and manages investment in over 40 countries throughout emerging and developing markets



INSURANCE



ADVISORY



EDUCATION

### BACKGROUND

As a fast growing, and highly diverse organization, the client needed to keep pace with the needs of its employees, comprised of multiple nationalities across 40 countries. In order to retain and recruit top talent in the investment world, as well as to meet its fiduciary duty to its staff, the firm needed to provide a group benefits program that offered comprehensive benefits, irrespective of location. Given the number of countries and nationalities involved, as well as limited employee populations in each location, off-the-shelf insurance programs would not meet their needs.

### SOLUTION

The client engaged Risk Cooperative to design a customized international benefits program. Risk Cooperative, through its extensive knowledge and experience with international organizations, was able to develop a group plan that afforded all staff equal coverage, regardless of their nationality. The program was designed to provide the maximum levels of protection on a global basis, for life, medical and disability protection. This solution not only met the basic needs of employees, the program also aligned to the corporate philosophy of the fund, ensuring that pre-existing conditions, or other marginalized coverage exclusions were not applicable.



Risk Cooperative is a minority-owned strategy, risk, and insurance advisory firm, providing institutions with customized risk transfer and insurance solutions in partnership with leading insurance companies and value adding partners. We approach risk with integrated insurance, advisory and educational capabilities, helping organizations address risk, readiness and resilience through our consultative engagement model, Resiliency 360°. Risk Cooperative is licensed in all 50 states, D.C., and Puerto Rico.

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