



**TIBURON STRATEGIC ADVISORS**

Strategy Consultants to Financial Institutions

*Financial Institutions Profiles Series*

Allianz:  
A Worldwide Insurance & Investment Management Firm

---

(Table of Contents)



*October 27, 2016*

**TABLE OF CONTENTS**

- History.....
  - Early Phase.....
  - Business Expansion Phase.....
  - The Hartford Financial Services Group Rescue Phase.....
  - PIMCO Turmoil Phase.....
- Statistics.....
  - Countries.....
  - Offices.....
  - Employees.....
  - Clients.....
  - Insurance in Force.....
  - Assets Under Management.....
  - Revenues.....
  - Operating Income.....
  - Net Profits.....
- Businesses.....
  - Property & Casualty Insurance.....
    - Statistics.....
    - Revenues.....
    - Net Profits.....
  - Businesses.....
    - Business One.....
      - Statistics.....
      - Statistic One.....
      - Statistic Two.....
    - Services.....
      - Service One.....
      - Service Two.....
  - Allianz Global Corporate & Specialty (AGCS).....
    - Statistics.....
    - Revenues.....
    - Net Profits.....
  - Businesses.....
    - Large Corporate.....
      - Statistics.....
      - Revenues.....
      - Net Profits.....
    - Services.....
      - Service One.....
      - Service Two.....
  - Specialty Products.....
    - Statistics.....
    - Revenues.....
    - Net Profits.....
  - Services.....
    - Service One.....
    - Service Two.....
- Property.....

Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Casualty.....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Aviation.....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Construction .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Energy .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
International.....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Marine.....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Mid Corporation Property & Casualty.....	
Statistics .....	
Revenues .....	

- Net Profits .....
- Services.....
  - Service One .....
  - Service Two .....
- Farm & Ranch.....
  - Statistics .....
  - Revenues .....
  - Net Profits .....
  - Services.....
    - Service One .....
    - Service Two .....
- Small & Mid Size Businesses.....
  - Statistics .....
  - Revenues .....
  - Net Profits .....
  - Services.....
    - Service One .....
    - Service Two .....
- Small Businesses .....
- Statistics .....
- Revenues .....
- Net Profits .....
- Services.....
  - Service One .....
  - Service Two .....
- Programs.....
  - Statistics .....
  - Revenues .....
  - Net Profits .....
  - Services.....
    - Service One .....
    - Service Two .....
- Crop.....
  - Statistics .....
  - Revenues .....
  - Net Profits .....
  - Services.....
    - Service One .....
    - Service Two .....
- Entertainment .....
- Statistics .....
- Revenues .....
- Net Profits .....
- Services.....
  - Service One .....
  - Service Two .....
- Professional Liability .....
- Statistics .....
- Revenues .....
- Net Profits .....
- Services.....

Service One .....	
Service Two .....	
Directors & Officers.....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Professional Indemnity.....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Errors & Omissions.....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services.....	
Service One .....	
Service Two .....	
Life & Health Insurance .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Businesses.....	
German Life Insurance Business.....	
Statistics .....	
Assets Under Management.....	
Revenues .....	
Net Profits.....	
Services.....	
Service One .....	
Service Two .....	
Allianz Life Insurance of North America.....	
Statistics .....	
Life Insurance in Force .....	
Assets Under Management.....	
Revenues .....	
Net Profits.....	
Businesses .....	
Variable Annuities .....	
Statistics .....	
Life Insurance in Force.....	
Assets Under Management .....	
Revenues .....	
Net Profits .....	
Annuity Products .....	
Advantage.....	

Statistics .....	
Revenues .....	
Net Profits .....	
Services .....	
Service One .....	
Service Two .....	
Alterity .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services .....	
Service One .....	
Service Two .....	
Charter .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services .....	
Service One .....	
Service Two .....	
Dimensions .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services .....	
Service One .....	
Service Two .....	
Rewards .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services .....	
Service One .....	
Service Two .....	
Valuemark IV .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services .....	
Service One .....	
Service Two .....	
Valuemark Income Plus .....	
Statistics .....	
Revenues .....	
Net Profits .....	
Services .....	
Service One .....	
Service Two .....	
US Allianz Investor Services .....	
US Allianz Academy .....	
Questar Capital Corporation .....	

- Statistics .....
  - Employees .....
  - Rep Offices .....
  - Reps .....
  - Reps Per Office.....
  - Reps who Produce More than \$100,000 .....
  - Accounts .....
  - Accounts Per Rep .....
  - Assets Under Administration .....
  - Assets Under Administration Per Rep .....
  - Revenues.....
  - Revenues Per Rep.....
  - Return on Assets.....
  - Net Profits .....
- Products & Services.....
  - Mutual Funds .....
  - Mutual Fund Family Relationships .....
  - Mutual Fund Offerings.....
  - Mutual Fund Assets Under Administration .....
  - Mutual Fund Revenues .....
  - Annuities .....
  - Variable & Fixed Annuity Provider Relationships....
  - Variable & Fixed Annuity Offerings.....
  - Variable & Fixed Annuity Assets Under Administration .....
  - Variable & Fixed Annuity Revenues .....
  - Managed Accounts.....
  - Fee-Accounts .....
  - Fee-Account Assets Under Management .....
  - Fee-Account Revenues .....
  - Individual Securities, Insurance, Limited Partnerships & Other Products.....
- Payouts & Fees.....
  - Payouts .....
  - Fees .....
- Customer Service .....
- Licensing.....
- New Accounts .....
- Account Transfers .....
- Legal & Compliance .....
- Trading.....
- Commissions.....
- Statements.....
- Business Building Assistance.....
  - Start-Up .....
  - Marketing .....
  - Staffing & Compensation .....
  - Benchmarking .....
  - Succession Planning.....
- Technology Offerings .....
- New Client Sales.....

- Calculators .....
- Financial Planning .....
- Asset Allocation.....
- Stock Quotes.....
- Variable Life.....
- Statistics .....
- Statistic One.....
- Statistic Two.....
- Services .....
- Service One .....
- Service Two .....
- The Hartford Financial Services Group (5% Ownership Stake) .....
- Statistics .....
- Employees .....
- Independent Agencies.....
- Registered Broker/Dealers .....
- Revenues .....
- Net Profits .....
- Businesses.....
- Hartford Property & Casualty.....
- Statistics .....
- Premiums Written.....
- Combined Ratio .....
- Services.....
- Service One .....
- Service Two .....
- Hartford Life .....
- Statistics .....
- Premiums, Fee Income, & Other Revenues .....
- Variable Annuities .....
- Life Insurance Sales.....
- Services.....
- Service One .....
- Service Two .....
- Investment Services Operations.....
- Statistics .....
- Statistic One.....
- Statistic Two.....
- Services.....
- Service One .....
- Service Two .....
- Service Companies .....
- Statistics .....
- Statistic One.....
- Statistic Two.....
- Services.....
- Service One .....
- Service Two .....
- International .....
- Statistics .....
- Statistic One.....



Statistic Two.....	
Services.....	
Service One .....	
Service Two .....	
Asset Management (Allianz Global Investors) .....	
Statistics .....	
Employees .....	
Assets Under Management .....	
Net Flows .....	
Revenues .....	
Net Profits .....	
Businesses.....	
PIMCO .....	
Statistics .....	
Offices .....	
Employees .....	
Clients.....	
Assets Under Management.....	
Net Flows.....	
Revenues .....	
Net Profits.....	
Businesses .....	
Institutional Mutual Funds .....	
Statistics.....	
Assets Under Management .....	
Net Flows .....	
Revenues .....	
Net Profits .....	
Businesses.....	
Business One .....	
Business Two .....	
Retail Mutual Funds .....	
Statistics.....	
Mutual Funds.....	
Assets Under Management .....	
Net Flows .....	
Revenues .....	
Net Profits .....	
Businesses.....	
Business One .....	
Business Two .....	
Separate Accounts .....	
Statistics.....	
Separately Managed Accounts.....	
Assets Under Management .....	
Net Flows .....	
Revenues .....	
Net Profits .....	
Businesses.....	
Business One .....	
Business Two .....	

Nicholas Applegate .....	
Statistics .....	
Employees .....	
Mutual Funds .....	
Assets Under Management.....	
Net Flows.....	
Revenues .....	
Net Profits.....	
Businesses .....	
Mutual Funds .....	
Business Two .....	
Oppenheimer Capital.....	
Statistics .....	
Mutual Funds .....	
Assets Under Management.....	
Net Flows.....	
Revenues .....	
Net Profits.....	
Businesses .....	
Mutual Funds .....	
Business Two .....	
RCM.....	
Statistics .....	
Mutual Funds .....	
Assets Under Management.....	
Net Flows.....	
Revenues .....	
Net Profits.....	
Businesses .....	
Mutual Funds .....	
Business Two .....	
Organization & Ownership.....	
Organizational Structure .....	
Organizational Chart.....	
Board of Directors.....	
Ownership .....	
Publicly Owned .....	
Assets.....	
Liabilities .....	
Shareholders Equity.....	
Earnings Per Share.....	
Dividends Per Share .....	
Dividend Yield.....	
Stock Price.....	
Shares Outstanding .....	
Market Capitalization .....	
Ownership by Owner .....	
Stock Volume.....	
The Hartford Financial Services Group .....	
Publicly Owned .....	
Assets .....	

Liabilities .....	
Shareholders Equity .....	
Earnings Per Share .....	
Dividends Per Share .....	
Dividend Yield .....	
Stock Price .....	
Shares Outstanding .....	
Market Capitalization .....	
Ownership by Owner .....	
PIMCO Ownership .....	
Publicly Owned .....	
Assets .....	
Liabilities .....	
Shareholders Equity .....	
Earnings Per Share .....	
Dividends Per Share .....	
Dividend Yield .....	
Stock Price .....	
Shares Outstanding .....	
Market Capitalization .....	
Ownership by Owner .....	