

# Biography



## Contact information

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## Education

- BS in Accounting  
Southeastern Louisiana University
- MS in Taxation  
DePaul University
- MBA  
The Ohio State University

## Memberships

- Certified public accountant licensed in Illinois, Louisiana, Ohio and Texas
- Member of the American Institute of Certified Public Accountants
- Fellow, Life Management Institute designation with distinction from the Life Office Management Association

## Paul H. Phillips III

*Partner, Tax Services*

*Global Tax Leader of EY's Global Captive Network*

*Insurance Tax Markets leader, Financial Services Organization, Tax*

## Professional background

- Paul is a Tax partner in Ernst & Young LLP's Financial Services Organization (FSO) with over 30 years of public accounting experience.
- Paul serves as the Americas Insurance Tax Markets Leader for the FSO Americas Tax practice overseeing the insurance practice's go to market efforts, service offerings, industry relationships and firm professionals across the Americas.
- In addition to his Americas roles Paul serves as the Tax and Strategy leader of EY's Global Captive Network, coordinating efforts across various service lines and overseeing the execution and delivery of services in 22 countries.
- Paul serves as a Tax partner for various financial services organizations, as his career has been focused on the taxation of banking institutions, financial products and insurance companies.
- Globally, Paul oversees engagements involving certain risk, treasury and capital management structures, including captive insurance and guarantee structures and cost-sharing arrangements.
- Paul has coordinated tax services for companies ranging widely in size and complexity, including large global organizations, Fortune 1000 companies, regional and community banks, US domestic insurance companies and multiple captive insurance enterprises.
- Paul has assisted clients regarding financial statement disclosure matters, corporate reorganizations, private-letter rulings, international tax matters, tax technology improvements and automation, examinations or audits by the Internal Revenue Service and state authorities as well as the preparation and review of various governmental filing responsibilities (i.e., federal and state tax compliance services).
- He has also advised clients on insurance risk transfers including insurable risks, product qualification, risk shifting, risk distribution, organizational considerations and company qualification matters.
- In February 2024 Paul was named among the Top 25 professionals in the prior 25 years in service to the Captive Insurance Industry.
- In May of 2023 Paul was named the 11th-most influential professional in the insurance industry and a member of the Global Power 50 by the Captive Review. Paul has been recognized on this list every year since 2018, ranking from 11<sup>th</sup> to as high as 4<sup>th</sup> globally.

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