

Financial Institutions D&O Highlight Sheet

Policy Highlights and Features

- Appetite includes traditional financial institutions as well as financial services companies
- Can consider public traded, privately held and nonprofit Financial Institutions risks
- Primary wrap policy offering Directors & Officers, Employment Practices Liability, Fiduciary Liability and Errors & Omission coverage
- E&O extensions for financial planning, mortgage banking, registered investment advisers, non-bank commercial lending and community development financial institutions
- Primary and excess limits up to \$10 million for D&O and \$5 million for E&O

[Click here](#) for policy features and product highlights.

Target Industries

- Insurance Companies
- Insurance Agents/Brokers
- Registered Investment Advisers
- Nonprofit Lenders
- Non-Bank Commercial Lenders
- Third-Party Administrators
- Managing General Agencies
- Property REITs
- Mortgage Bankers/Brokers
- Fintech

[Click here](#) to view acceptable class list.

Target Market

Financial Services		Investment Advisers	
Employees	Appetite	AUM	Appetite
0-100	Most Competitive	< \$250 million	Most Competitive
101-250	Very Competitive	\$250 million - \$5 billion	Very Competitive
251-1,000	Competitive	\$1 billion - \$5 billion	Competitive
1,000 +	Conservative	> \$5 billion	Conservative

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