

BOOKKEEPING, PAYROLL AND TAX RECORDS

A filing error can cost a client.

You handle bookkeeping, payroll or tax work using sensitive financial records. Accepted services and insured funds need clear scope, with professional-error claims distinguished from defined theft or cyber events.

RISKS WORTH DISCUSSING

- 01 Calculation or tax-filing errors
- 02 Financial-record privacy breaches
- 03 Theft involving expressly insured funds

Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Professional liability

Covered claims alleging accepted accounting-service errors.



Cyber liability

Covered financial-data breach response and privacy claims.



Crime insurance

Defined employee theft involving expressly insured funds.



Business owners policy

Eligible office property and premises liability together.

Coverage is subject to policy terms and exclusions.

Why The Southern Agency

01 Listen

We review your operations, coverage and past claims.

02 Assess

We look at hazards and ways to reduce risk.

03 Build

We compare carriers, premiums and audit terms.

04 Support

We revisit coverage as your work changes.



SCAN TO

Read the full
guide

800-777-1872

TheSouthernAgency.com