

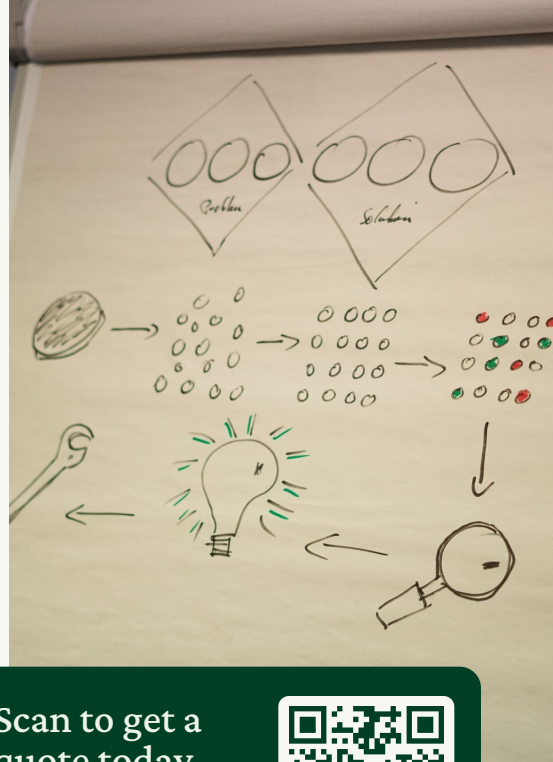
OPERATING PLANS AND CLIENT DECISIONS

An operating plan can draw a claim.

You advise clients on organizational structure and operating plans. Accepted advice, subcontracted roles and confidential records need defined terms, with missed business targets distinguished from professional negligence.

RISKS WORTH DISCUSSING

- 01 Alleged errors in operating advice
- 02 Confidential client-record breaches
- 03 Claims over your firm's staff decisions



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Coverage worth discussing



Professional liability

Covered claims alleging accepted management–consulting errors.



General liability

Covered visitor injury from accepted consulting activities.



Cyber liability

Covered client–data breach response and privacy claims.



Employment practices

Covered employment claims against your own insured firm.

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.



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guide

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