

TAX RETURNS, AUDITS AND CLIENT FUNDS

An audit opinion can be challenged.

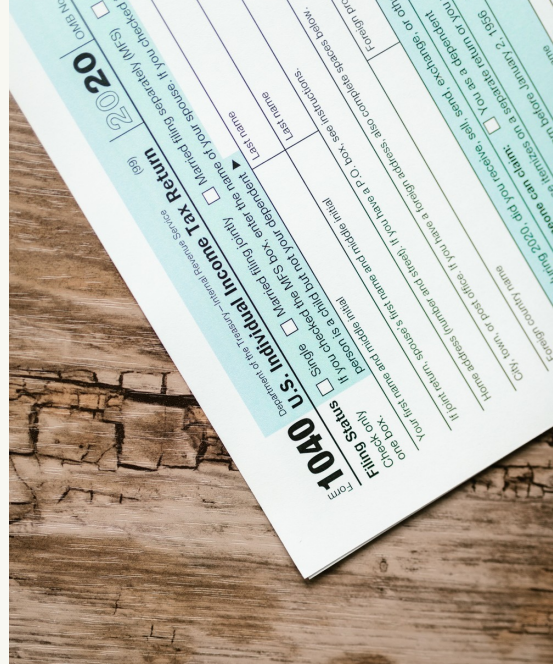
You provide accounting, tax or audit services using confidential financial records. Actual assurance duties and insured funds need accepted terms, with your firm's employment decisions distinct from client professional claims.

RISKS WORTH DISCUSSING

- 01 Tax or audit-service error allegations
- 02 Confidential financial-record breaches
- 03 Theft involving expressly insured funds

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Coverage worth discussing



Professional liability

Covered claims alleging accepted accounting or audit errors.



Cyber liability

Covered financial-data breach response and privacy claims.



Crime insurance

Defined employee theft involving expressly insured funds.



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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