The Southern Agency
Insurance & Bonds

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**

Scan to get a quote today

Or call
800-777-1872

CPA OFFICE INSURANCE

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.

SCAN TO
Read the full guide

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TheSouthernAgency.com