

CHARITABLE ASSETS AND GRANT ADMINISTRATION

Grant decisions can face trustee challenges.

You invest charitable assets, authorize grants and hold donor records. Trustee disputes, diverted grant funds and privacy incidents need terms accepting the trust and actual trustee duties.

RISKS WORTH DISCUSSING

- 01 Allegations of mismanagement
- 02 Conflict-of-interest disputes
- 03 Grant-fund embezzlement

Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Directors and officers

Covered governance claims for expressly insured trustee roles.



Cyber liability

Covered donor-record breach response and privacy claims.



Crime insurance

Defined theft of insured grant funds by covered people.



Professional liability

Eligible errors in accepted trust-administration services.

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

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