

PORTFOLIO AND BUSINESS MANAGEMENT

Portfolio decisions can trigger management claims.

You guide businesses across industries and allocate capital. Management-service claims, subsidiary responsibilities and group records need clear entity and role boundaries.

RISKS WORTH DISCUSSING

- 01 Management and oversight liability
- 02 Financial fraud and dishonesty
- 03 Cyber breach of consolidated data

Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Directors and officers

Covered management claims for scheduled entities.



Cyber liability

Covered response involving accepted group-data systems.



Professional liability

Eligible claims from accepted management-advisory services.



Crime insurance

Covered employee theft or accepted payment-fraud losses.

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