

REGULATORY FILING AND FORM ASSISTANCE

Filing errors can cause client financial loss.

You gather information and complete forms for regulatory filings. Because you guide others through complex processes, filing errors can result in liability claims.

RISKS WORTH DISCUSSING

- 01 Inaccurate filings causing loss
- 02 Disputed scope of permitted services
- 03 Breach of sensitive client records



Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Professional liability

Eligible claims from accepted document-preparation services.



General liability

Addresses injury claims occurring at your office.



Cyber liability

Covers investigation costs after client data breaches.



Crime insurance

Covered employee theft of expressly accepted client funds.

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