

FAMILY INVESTMENT AND ESTATE OVERSIGHT

False payment instructions can divert family funds.

You coordinate investments, estate administration and household staffing. Family assets, advisory duties and private records need clear entity and role boundaries.

RISKS WORTH DISCUSSING

- 01 Investment and financial advice claims
- 02 Social-engineering fraud and wire diversion
- 03 Cyber breach of private family data

Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Professional liability

Eligible claims from accepted advisory or administration services.



Cyber liability

Covers investigation costs after family data breaches.



Crime insurance

Covered employee theft or accepted transfer-fraud losses.



Directors and officers

Covered management claims involving scheduled family entities.

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