

TRUST ASSETS AND BENEFICIARY ADMINISTRATION

Beneficiary disputes can challenge a trustee.

You manage trust assets, distributions and beneficiary records. Accepted trustee duties and the actual ownership and occupancy of trust property determine the interests to review.

RISKS WORTH DISCUSSING

- 01 Alleged breach of duty
- 02 Improper investment and accounting
- 03 Trust property premises injury

Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Professional liability

Eligible errors in accepted trust-administration duties.



Crime insurance

Defined theft involving insured trust interests and people.



General liability

Covered third-party injuries at accepted trust premises.



Commercial property

Insured trust-owned property under accepted occupancy terms.



Cyber liability

Covered beneficiary-record breach response and privacy claims.

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