

FUND MANAGEMENT OFFICE

False redemption instructions can divert funds.

You run the management office behind fund raising and investor instructions. Redemption disputes and fraudulent payments require clear entity-specific liability terms.

RISKS WORTH DISCUSSING

- 01 Fraudulent wire redemption instructions
- 02 Confidential investor data compromise
- 03 Management fee allocation claims

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quote today

Or call
800-777-1872



Coverage worth discussing



Professional liability

Eligible advisory errors in accepted management services.



Crime insurance

Defined transfer fraud involving insured office assets.



Cyber liability

Covered investor-record breach response and privacy claims.



Directors and officers

Covered management claims against accepted management 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

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