

GRANTMAKING, GOVERNANCE AND DONOR RECORDS

A grant decision can draw a claim.

You steward charitable assets and choose mission grants. Accepted board or grant-administration duties, donor records and insured funds need distinct terms, separate from promised investment or grant outcomes.

RISKS WORTH DISCUSSING

- 01 Challenges to grant-governance decisions
- 02 Donor or financial-record breaches
- 03 Theft involving insured foundation funds

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quote today

Or call
800-777-1872



Coverage worth discussing



Directors and officers

Covered governance claims against insured foundation leaders.



Crime insurance

Defined theft involving expressly insured foundation funds.



Cyber liability

Covered donor–data breach response and privacy claims.



Professional liability

Covered claims alleging accepted grant–administration errors.

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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