

CLIENT RECORDS AND BOOKKEEPING

A filing error can cost a client.

You support client businesses with records and bookkeeping, where an administrative error or data breach can lead to significant financial claims.

RISKS WORTH DISCUSSING

- 01 Financial loss from missed deadlines
- 02 Unauthorized client payment wire fraud
- 03 Confidential client data privacy breaches



Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Professional liability

Eligible claims from accepted administrative service errors.



Business owners policy

Packaged property and liability for eligible offices.



General liability

Covered third-party injury at insured offices.



Cyber liability

Covered response to breaches of client records.



Crime insurance

Covered employee theft or accepted computer-fraud losses.



Workers compensation

Employee injury benefits for eligible office staff.

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