The Southern Agency
Insurance & Bonds

RETIREMENT ASSETS AND PLAN ADMINISTRATION

Benefit decisions can draw claims.

You oversee retirement-plan assets and records. Benefit-plan fiduciary protection and required bond duties need distinct review alongside accepted administration, theft and privacy interests.

RISKS WORTH DISCUSSING

01 **Plan fiduciary duty allegations**

02 **Benefit calculation or record errors**

03 **Participant-record privacy breach**

Scan to get a quote today

Or call
800-777-1872

PENSION FUND INSURANCE

Coverage worth discussing

Employment practices
Covered employment claims involving accepted administration staff.

Crime insurance
Defined dishonesty losses involving insured plan-asset interests.

Cyber liability
Covered participant-record breach response and privacy claims.

Professional liability
Eligible errors in accepted benefit-administration services.

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

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TheSouthernAgency.com