The Southern Agency
Insurance & Bonds

ENDOWED ASSETS AND CHARITABLE GRANTS

Trustee decisions can be challenged.

You administer endowed assets and charitable grants. Actual trustees, investment roles and insured funds need specific terms, separate from principal restoration or routine distribution duties.

RISKS WORTH DISCUSSING

01 **Claims over accepted trustee duties**

02 **Theft involving insured trust assets**

03 **Grant-administration error allegations**

Scan to get a quote today

Or call
800-777-1872

PHILANTHROPIC TRUST INSURANCE

Coverage worth discussing

Directors and officers
Accepted trust-management liability for expressly insured trustees.

Crime insurance
Defined theft involving expressly insured trust assets.

Cyber liability
Covered beneficiary-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
TheSouthernAgency.com