

FUND AND PORTFOLIO GOVERNANCE

Board seats bring separate duties.

You raise capital and take governance roles in portfolio companies. Fund, manager and outside-board capacities need distinct accepted terms for deal disputes and investor allegations.

RISKS WORTH DISCUSSING

- 01 Investor breach of agreement claims
- 02 Valuation disputes regarding illiquid holdings
- 03 Portfolio board director liability claims



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quote today

Or call
800-777-1872



Coverage worth discussing



Directors and officers

Covered claims in accepted fund, partner or outside-board roles.



Professional liability

Eligible errors in accepted management or valuation services.



Crime insurance

Defined theft or transfer fraud involving insured capital.



Cyber liability

Covered investor-data breaches during accepted diligence work.

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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