The Southern Agency
Insurance & Bonds

TAX RETURNS AND CLIENT RECORDS

A filing mistake can draw a claim.

You prepare returns and give accepted tax advice during concentrated filing seasons. Professional claims, confidential records and insured funds need terms distinct from every client tax balance or penalty.

RISKS WORTH DISCUSSING

01 **Tax-preparation or filing-error allegations**

02 **Confidential tax-record breaches**

03 **Theft involving expressly insured funds**

Scan to get a quote today

Or call
800-777-1872

TAX PREPARATION SERVICE INSURANCE

Coverage worth discussing

Professional liability
Covered claims alleging accepted tax-preparation service errors.

Cyber liability
Covered tax-data breach response and privacy claims.

Business owners policy
Eligible office property and premises liability together.

Crime insurance
Defined theft involving expressly insured funds.

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