

ESTATE AND TRUST ADMINISTRATION

Distribution errors draw claims.

You administer trusts or estates, maintain accounts and distribute assets. Trustee appointments, accepted service duties and ownership of managed property determine the interests to review.

RISKS WORTH DISCUSSING

- 01 Prudence and distribution disputes
- 02 Trust accounting and record errors
- 03 Breach of sensitive beneficiary data



Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Professional liability

Eligible errors in accepted trustee or administration services.



Crime insurance

Defined theft or transfer fraud involving insured trust interests.



Employment practices

Covered employment allegations involving accepted firm staff.



Directors and officers

Covered governance claims in accepted firm leadership roles.



Cyber liability

Covered beneficiary or grantor-record breach response.

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