

EARLY-STAGE INVESTMENT AND BOARD ROLES

A portfolio board seat brings separate duties.

You raise capital for early-stage investments and take board seats as companies grow, creating governance, management, and capital-transfer risks.

RISKS WORTH DISCUSSING

- 01 Portfolio company board claims
- 02 Disputed private holding valuations
- 03 Investor and founder capital fraud

Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Directors and officers

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



Crime insurance

Defined theft or transfer fraud involving insured assets.



Employment practices

Covered employment allegations involving accepted firm staff.



Professional liability

Eligible errors in accepted management or valuation services.



Cyber liability

Covered breaches of deal, founder or investor records.

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