

FINANCIAL PLANNING AND CLIENT PORTFOLIOS

A spoofed client request can divert funds.

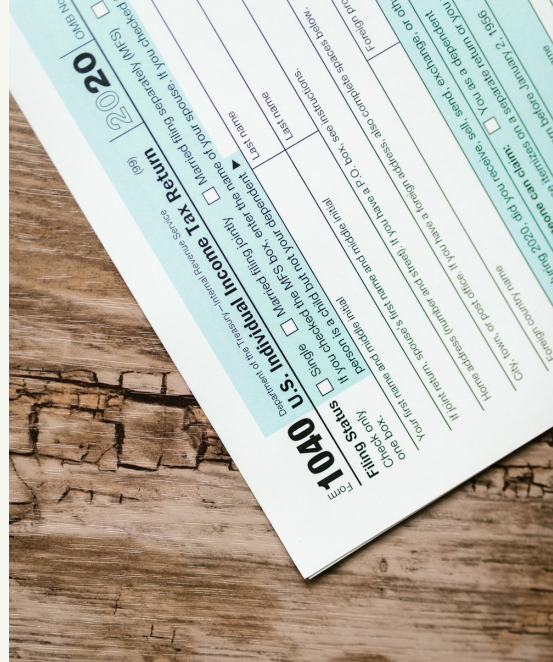
You plan finances and manage client portfolios. Advice disputes, impersonated payment requests and sensitive account records involve distinct accepted professional, crime and privacy terms.

RISKS WORTH DISCUSSING

- 01 Unsuitable investment planning advice
- 02 Spoofed client transfer requests
- 03 Sensitive financial records breach

Scan to get a
quote today

Or call
800-777-1872



Coverage worth discussing



Professional liability

Eligible planning errors in accepted advisory roles.



Crime insurance

Defined theft or expressly accepted social-engineering losses.



Directors and officers

Covered management claims in accepted advisory-entity roles.



Cyber liability

Covered client-record breach response and privacy claims.



Business owners policy

Office property and general liability for an eligible practice.

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