



Investment Advisor PLATINUM PROTECTION

Capacity

Primary – up to \$5,000,000
Excess – up to \$10,000,000

Minimum Retentions

Investment Advisors - \$25,000
Mutual Funds - \$75,000
Hedge Funds - \$250,000

Classes of Business

- Registered Investment Advisors
- Mutual Funds
- Hedge Funds – Long/Short Equity Funds only

Appetite for Primary

- RIA/Mutual Funds < \$5 billion AUM
- Hedge Funds < \$3 billion AUM

Coverage

- Investment Advisor Professional Liability
- Investment Advisor Management Liability
- Investment Fund Management & Professional Liability
- Service Provider Professional Liability
- Hedge Fund Management & Professional Liability
- Employment Practices Liability
- Fiduciary Liability

Coverage Extensions

Cost of Corrections Sublimit
Cyber Sublimit

Insurance Company Professional Liability PLATINUM PROTECTION

Capacity

Primary – up to \$5,000,000
Excess – up to \$10,000,000

Minimum Retentions

P&C Insurance Companies – \$250,000
Life Insurance Companies – \$500,000

Classes of Business*

- P&C Insurance Companies
- Life Insurance Companies

* Required

AM Best Rating of A- or better

P&C Companies

- Up to \$1.5 billion in GWP on a Primary basis
- Up to \$5 billion in GWP Excess only
- Will not entertain monoline surety, financial guarantee, title, governmental or quasi governmental entities, medical liability, captives or risk retention groups.

Life Insurance Companies

- Up to \$1 billion in GWP on a Primary basis
- Up to \$5 billion in GWP Excess only
- Products offered must conform to traditional life insurance or protection products



WHY CRUM & FORSTER?

- Financial Strength rating by A.M. Best of A “Excellent”
- Part of Fairfax Financial Holdings with revenue in excess of \$19.8 B
- Flexible underwriting approach
- Dedicated and responsive underwriting team
- Customer service-based culture applied to everything we do
- Prompt new business quotes and early renewal indications
- Claims specialization

CONTACT

EASTERN

Kristine Christ
Vice President
T 201.334.4714
E Kristine.Christ@cfins.com

Sean Lukac
Assistant Vice President
T 201.334.4712
E Sean.Lukac@cfins.com

CENTRAL

David Flannery
Assistant Vice President
T 312.596.6640
E David.Flannery@cfins.com

WESTERN

Brian Heraty
Assistant Vice President
T 303.846.1907
E Brian.Heraty@cfins.com

Justin Thompson
Senior Underwriter
T 201.919.4979
E Justin.Thompson@cfins.com