

Investment Advisors & Fund Managers

Management & Professional Liability Insurance

The investment industry is operating in an increasingly volatile environment under intense scrutiny from both investors and regulators alike. Crum & Forster offers a specialized insurance solution for investment advisors, mutual funds, family offices and private fund managers.

Our Platinum Protection for Investment Advisors & Funds brings together a full array of Management & Professional Liability coverages into a single, modular policy to provide exactly the protection you need.



COVERAGE SUITE

- Investment Advisor Professional Liability
- Investment Advisor Management Liability
- Investment Fund Management & Professional Liability ('40 Act Funds)
- Service Provider Professional Liability
- Hedge Fund Management & Professional Liability
- Private Fund Management & Professional Liability
- Employment Practices Liability
- Fiduciary Liability

CAPACITY

- Primary / Excess: \$5,000,000

INSURANCE FOR INVESTMENT ADVISORS & FUNDS

A customizable product designed specifically for:

- Registered Investment Advisors
- Mutual Fund Managers / Funds
- Family Offices
- Private Fund Managers / Funds (Hedge Funds, PE/VC Funds, Real Estate Funds)
- Appetite for Primary: \$5B in AUM and Under; Will Consider Excess on Larger Accounts

COMPETITIVE ADVANTAGES

- Highly Experienced Team of Underwriters with Authority to Make Decisions
- Ability to Tailor Coverage to Each Insured's Unique Exposures
- Quick Turnaround Time and Exemplary Service Standards
- Backed by In-House Claims Team, all of which are Attorneys

CRUM & FORSTER – A GREAT COMPANY TO WORK WITH

A national specialty insurance company

- Long history of delivering forward-thinking insurance solutions
- Market-leading portfolio of insurance solutions

Empowered and accessible underwriters

- Fast decisions
- Flexible approach
- Proactive communication
- Personalized service

Financial Strength

- Backed by Fairfax Financial Holdings - \$42.3 in revenue (YE 2024)
- A rated by AM Best, A+ rated by S&P
- Long-term stability for partners and customers