

TRUSTEES LIABILITY PROGRAM

Trusts come in many shapes and sizes, presenting their trustees and service providers with a variety of duties which leads to a broad and complex range of exposures for trustees.

Trustees can provide a wide range of services to a trust and trust beneficiaries including but not limited to:

- » Investment management
- » Administration, reporting, and record keeping
- » Estate planning
- » Tax preparation and filing, planning, compliance
- » Legal
- » Property management
- » Charitable giving
- » Insurance management

Trustees can be held legally accountable for the decisions they make and the services they provide, with personal assets at stake. Claims against trustees can allege mismanagement, conflict of interest, self dealing, breach of fiduciary duty, misrepresentation, negligent supervision and selection, and professional negligence. Often these allegations are based on trustee actions that should be defensible but are still litigated.

Key coverages of our Trustees Liability program include:

- » Commercial General Liability coverage - \$2,000,000
- » Directors & Officers coverage - \$2,000,000
- » Crime coverage - \$250,000
- » Higher limits available
- » Criminal Defense coverage
- » Accidental Death and Dismemberment coverage
- » Fiduciary Liability coverage
- » Employment Practices coverage
- » Investment Advisors Professional Liability coverage



CONTACT US FOR A FREE QUOTE

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