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We underwrite opportunity.™

Key contact

John Humphreys

Head of Financial Institutions (646)276-0175 john.humphreys@everestglobal.com

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Why choose Everest

- ✓ Customers in more than 115 countries across 6 continents
- ✓ Bespoke solutions across geographies and business lines
- ✓ Intimate customer knowledge backed by local underwriting expertise and claims authority
- ✓ Steady execution across an agile and entrepreneurial platform
- ✓ Industry-leading talent providing a stable partnership and customer experience
- ✓ Financial strength and global capacity

U.S. headquarters

100 Everest Way Warren, NJ 07059 (908)604-3000 (800)269-6660

Learn more: Connect with us:

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Everest Specialty Underwriters

Financial Institutions

We are focused on providing D&O and E&O insurance to specific financial institution industry segments. Our specialized team structure allows us to align and leverage our underwriting expertise to provide creative solutions to your unique needs.

✓ Mutual Fund Independent

✓ Single Page Excess Policy

✓ D&O Real Estate Investment

Liability Policy (ICPL)

Trust(REIT) Expedition Policy

✓ Insurance company Professional

✓ Capacity up to \$25 million (USD)

(\$50 million (USD) available for

✓ Employment Practices Liability

Directors Liability

✓ Fiduciary Liability

✓ Fidelity Bonds

Side A)

Our offering

- ✓ Directors and Officers Liability
- ✓ Errors and Omissions/ Professional Liability
- ✓ Lead Side A/DIC
- ✓ Investment Advisors/Funds D&O and E&O

Coverage features

- ✓ Everest E-Z Excess Policy
- ✓ Everest Elevation[™] Investment Management D&O/E&O Policy
- ✓ IDL Side A & B Excess DIC Endorsement
- ✓ Mock audit cost reimbursement and mock audit retention reduction endorsement

Additional service capabilities

- ✓ Fully integrated and dedicated claims team with specific financial industry expertise
- ✓ Client-specific customized language
- ✓ Policies issued at binding
- ✓ Comprehensive coverage solutions for broker/dealers

Everest Group, Ltd. Financial strength ratings (2/20/2024) A.M. Best A.M. Best A.M. Best A.M. Best S&P Global Moody's Investors Service Stable outlook

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