



**Key contact**

**John Humphreys**

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

**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:**



## 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.

**Our offering**

- ✓ Directors and Officers Liability
- ✓ Errors and Omissions/ Professional Liability
- ✓ Lead Side A/DIC
- ✓ Investment Advisors/Funds D&O and E&O
- ✓ Mutual Fund Independent Directors Liability
- ✓ Employment Practices Liability
- ✓ Fiduciary Liability
- ✓ Fidelity Bonds
- ✓ Single Page Excess Policy

**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
- ✓ D&O Real Estate Investment Trust (REIT) Expedition Policy
- ✓ Insurance company Professional Liability Policy (ICPL)
- ✓ Capacity up to \$25 million (USD) (\$50 million (USD) available for Side A)

**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+**  
A.M. Best

**A+**  
S&P Global

**A1**  
Moody's Investors Service

← Stable outlook →