



Asset Management Industry



For over 130 years, Zurich has served the insurance needs of U.S. financial institutions. Through it all, we've delivered when it matters. Today, we work to give financial institutions what they need from an insurance company, including industry-leading financial ratings from A.M. Best (A+/stable) and Standard & Poor's (AA/stable).¹

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Capacity: Up to \$25 million primary/excess

- Customizable form intended to address the unique and variable needs of the asset management industry
- Retention and limit options adaptable to individual client risk appetite



Zurich Asset Management Solutions (ZAMS)

Zurich Asset Management Solutions (ZAMS) is a broad policy for advisers and fund managers to address litigation exposure from investors and limited partners, as well as increased regulatory risks. The fully integrated form also offers Fiduciary and Employment Practices Liability (EPL) options. Separate offerings include stand alone Cyber coverage, Financial Institutions Bond, and participation in Investment Company Bond programs.

Coverage features:

- Coverage for derivative demand investigation costs
- Inquiry costs coverage
- Non-party witness coverage
- Alternative investment fund managers directive coverage
- Outside position/directorship liability
- Insured-person-specific coverages including freedom protection costs, assets and liberty costs, and pre-insolvency hearing costs
- Independent director non-party witness costs
- Optional Pre-Claim Investigation Costs Extension
- Optional Mock Audit participation premium credit
- Real Estate amendatory language available

Appetite:

- Registered investment advisers
- '40 Act funds, including mutual funds
- Hedge funds
- Credit funds
- Venture capital
- Private real estate funds
- Fund of funds
- Family offices
- Business development companies
- Buy-Out funds

¹Rating as of January 31, 2022, A.M. Best and Standard & Poor's financial strength rating are under continuous review and subject to change and/or affirmation. For the latest Best's Ratings and Best's Company Reports (which include Best's Ratings), visit the A.M. Best website at www.ambest.com. The rating represents the overall financial status of the individual member companies of Zurich in North America, including Zurich American Insurance Company, and is not a recommendation of the specific policy provisions, rates or practices of each issuing insurance company. Zurich's risk appetite is subject to underwriting guidelines and further evaluation for qualification. Risk appetite is current as of August 1, 2022 and subject to change

Zurich

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