ZURICH

Zurich E&S 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 strength ratings from A.M. Best A+(Superior) and Standard & Poor's (AA/stable).[1]

Contacts

Carrie Goesel
Head of E&S Financial Lines
Zurich E&S
630-248-9624
carrie.goesel@zurichna.com

Ronald Beauregard
Head of Distribution
Zurich E&S
917-363-7840
ronald.beauregard@zurichna.com

Please send all Financial Institution submissions to the following mailbox for clearance:

ZurichEnS.FinInst.Subs@zurichna.com

Please continue to copy your assigned underwriter on the submission.

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

[1] Zurich's financial strength rating as of March 6, 2025. A.M. Best's and Standard & Poor's financial strength ratings 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. For the latest Standard & Poor's ratings, visit the S&P Global Ratings website at www.spglobal.com. The ratings represent the overall financial strength 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
1299 Zurich Way, Schaumburg, IL 60196-1056
800 982 5964 www.zurichna.com

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