



ADVISOR

## Insurance for CEFEX-certified firms

At Lockton Affinity Advisor, we understand what it means to be a CEFEX-certified firm. We're knowledgeable about the risks you face, ensuring that your firm receives a proper underwriting evaluation and the right coverage offerings to protect you and your firm.



### Why Lockton Affinity Advisor

Lockton Affinity Advisor specializes in tailored insurance solutions. CEFEX-certified firms have exclusive access to policy offerings, including:

#### FIDUCIARY INSURANCE

Designed to meet ERISA standards to ensure the fiduciary duties you perform are covered.

#### CYBER LIABILITY

Designed to protect against financial exposures in the event of a cyber incident.

### With us, you get more than insurance

When you partner with us, you get a multitude of benefits because we're specialists in the financial services industry.



#### SPEED AND EASE

Request a quote and purchase Fiduciary Insurance and Cyber Liability in less than 10 minutes.



#### EXPERIENCE

Since 1987, we have been creating, implementing and managing tailored insurance solutions for financial professionals, so we know how to meet your needs.



#### DEDICATED SERVICE

Our specialized service team is ready to support you, whether you have a simple question or a complex claim.

Get started today at [LocktonAffinityAdvisor.com/CEFEX](https://LocktonAffinityAdvisor.com/CEFEX) or call **(844) 406-5958**.

The Lockton Affinity Advisor Insurance program is administered by Lockton Affinity, LLC d/b/a Lockton Affinity Insurance Brokers LLC in California #0795478. Coverage is subject to actual policy terms and conditions. Policy benefits are the sole responsibility of the issuing insurance company. Coverage may be provided by an excess/surplus lines insurer which is not licensed by or subject to the supervision of the insurance department of your state of residence. Policy coverage forms and rates may not be subject to regulation by the insurance department of your state of residence. Excess/Surplus lines insurers do not generally participate in state guaranty funds and therefore insureds are not protected by such funds in the event of the insurer's insolvency. Sponsors may receive a royalty fee for the licensing of its name and trademarks as part of the insurance program offered to the extent permitted by applicable law. Not available in all states.