

## Errors & Omissions Insurance for RIA's affiliated with Fi360



**Affordable and comprehensive Errors & Omissions Insurance for RIA's delivered by CalSurance® and an admitted carrier rated A+ by AM Best\***

- ✓ NO GROUP POLICY AGGREGATE – You don't share your limits with other enrolled RIA's
- ✓ Deductibles as low as \$5,000/claim
- ✓ Premiums as low as \$1,250
- ✓ Additional discounts available for firms that have an active CEFEX certification from the Centre for Fiduciary Excellence and have Investment Advisory Representatives/Associated Persons that hold an active Accredited Investment Fiduciary® (AIF®) designation
- ✓ Coverage options for Prior Acts as a Registered Representative, Network Security (Cyber), Social Engineering and Employee Theft available
- ✓ Each policy receives a \$25k sublimit for Data Incident Response Expense at no charge with the ability to purchase higher limits
- ✓ Firm level protection. Coverage extends to the entire firm and all advisors.
- ✓ Best in class claim services through Lancer Claims Services
- ✓ Coverage is backed by an experienced, A+ (Superior) rated carrier

**Enroll Online Today at: [www.calsurance.com/ria360](http://www.calsurance.com/ria360)**

**Should you have any questions about this program, please call or email us at:**

**Phone: 800-745-7189 or [info@calsurance.com](mailto:info@calsurance.com)**

See policy specimen for full details.

*\* The information obtained from A.M. Best dated June 2, 2022 is not in any way CalSurance Associates' warranty or guaranty of the financial stability of the insurer in question, and that the information is current only as of the date of publication.*