

Divorce financial consultants

Professional liability insurance



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Whether you are a Divorce Financial Consultant or an insurance broker attempting to find coverage for your client, Markel is committed to helping you through the process of securing coverage. Since 1988, our program has always been focused on providing personalized service. Our leadership has a wealth of knowledge and experience in advisory practice management, as well as the claims process. Even with recurring economic volatility throughout the years, Markel has remained a solid, stable market. We can work with you to structure an insurance policy that fits your specific needs.

Coverage highlights

Strong defense provision

- “**Right and duty**” to defend – a contractual obligation to defend against covered wrongful acts
- Most protective option available to policyholders

Incident trigger

- Written demand not required to trigger loss control
- 50% waiver of deductible (up to \$12,500) for claim settlement through mediation

Broad coverage for business activities

- Professional services rendered or advice given to others by the insured for a fee, remuneration, or other consideration
- Activities including divorce mediation, preparation of expert testimony and financial models, and personal budgeting advice
- Assistance to a licensed attorney in preparation of a Qualified Domestic Relations Order (QDRO)

Multiple coverage options

- Stand-alone Divorce Financial Consultant policy
- Also available as an endorsement to a Registered Investment Advisor policy

Limit options from \$100,000/\$200,000 to \$5,000,000/\$5,000,000

examined on a case-by-case basis

Deductible options from \$1,000

Premium discounts

- Members of trade associations, custodians, and other organizations which are affinity partners

Additional policy features

- Worldwide coverage for claims brought in the U.S., its territories, and Canada
- Free 60-day extended reporting period
- One-year bilateral tail

DataBreach, and electronic media liability

- Separate limits up to \$1,000,000
- Privacy liability
- Forensic expense
- Public relations expense
- Variable deductibles available

If an event occurs that may result in damage to your practice, our experience and service will be your asset. We use the best forensic accountants and expert legal counsel in compliance and securities trial law.

Applications

Receive more information and applications at markelinvestmentadvisors.com or call 800-691-1515.

Send completed applications to investmentadvisors@markelcorp.com.

Risk management resources

Articles and newsletters available to customers at markelinvestmentadvisors.com.

Hotline for risk management and loss prevention

Policyholders have access to our risk management and loss prevention hotline. This hotline allows policyholders to discuss potential claim scenarios with an attorney. Markel will pay up to \$10,000 (without triggering the deductible) in investigative costs if the policyholder calls us before a claim is filed.

Markel can write coverage for any broker that has a surplus lines license. Coverage availability varies by state.

Markel Assurance

MarkelInvestmentAdvisors.com | MarkelInsurance.com

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