





LOCAL SERVICES SUPPORTED BY NATIONAL RESOURCES

## **CBIZ** Banking Insurance

With first-hand banking experience, we understand the environment of your financial institution. Our bank insurance professionals have the knowledge and expertise to ensure your bank has the right coverage.

Bank organizations face many unique challenges. Expanding regulatory requirements, eroding margins, and issues involving data security continue to increase the industry's complexity. CBIZ Insurance Services, Inc. works with you to address these concerns, including new and emerging risks.

Our advisors will conduct a comprehensive review of your insurance policies, as well as an in-depth analysis of your potential risks. Serving over 500 banks, we identify the entire scale of your bank's exposures and provide custom options to help avoid, mitigate or transfer risk.

We leverage our experience in banking and insurance to help your financial institution:

- Manage risk by proactively assessing policies
- Maximize coverage and reduce costs
- Build a comprehensive, tailored risk management plan
- Achieve peace of mind with a holistic risk approach

### Areas of Expertise

- D&O/Bond Policies
- Cybersecurity
- Professional Liability
- Banker's Crime Bond
- Mortgage E&O/Impairment
- Bank-Owned Life Insurance

#### Who We Are

CBIZ Insurance Services, Inc. provides a holistic approach to managing your organization's risk. As one of the country's largest publicly-owned property and casualty insurance brokers, clients receive the resources of a national broker and the personal attention of a local office.

20+ 300+ 30,000+ OFFICES
PROFESSIONALS
CLIENTS

Our experienced risk and insurance advisors partner with our colleagues in the employee and financial services sectors to offer a wide range of comprehensive business and risk management solutions. Please refer to the reverse side for more information on CBIZ.

# **Contact a trusted advisor** for a no-obligation consultation and risk assessment:



Jeff Maas President, CBIZ Minneapolis 763.549.2266 JMaas@cbizaia.com



Kris St. Martin
Vice President,
Bank Program Director
763.549.2267
kStMartin@cbizaia.com



### Multiple Services with a Single Focus: Your Success



CBIZ enables you to dedicate your time to critical business matters by providing custom solutions that help you manage your risk, finances and employees.

### Financial & Accounting

- Accounting & Tax
- Government Health Care Consulting
- Financial Advisory
- Valuation
- Litigation Support
- Risk & Advisory Services
- Real Estate Advisory Services



### Benefits & Risk Management

- Risk Management
- Property & Casualty
- Benefits Consulting
- Payroll Services
- HRIS Technology
- Retirement Plan Services
- Talent & Compensation Solutions

