

CREDIT UNION



LOCAL SERVICES SUPPORTED BY NATIONAL RESOURCES

CBIZ Credit Union Insurance

Invest in your risk management plan. Let our credit union insurance experts ensure you have the right coverage.

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.

325+ | PROFESSIONALS

31,000+ | 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.

Contact a trusted advisor for a no-obligation consultation and risk assessment.

cbiz.com/insurance

Credit Unions face many unique challenges. Fluctuating interest rates, expanding regulatory requirements, fast changing technology, third party relationships and issues involving cyber security continue to increase the industry's complexity. CBIZ Insurance Services, Inc. collaborates with you to address these concerns, including new and emerging risks.

With years of first-hand experience, we understand the financial institution environment. Our advisors meet annually with your team to discuss industry risks and changes to your organization. We leverage this knowledge to convey your story to Underwriters to acquire the most comprehensive coverage and limits, at the lowest possible cost. Many times, we negotiate custom options to help avoid, mitigate, or transfer risk. Don't limit your Credit Union to an off-the-shelf insurance policy.

The CBIZ Difference

- Provides peace of mind with a holistic Organization Risk Management approach
- Places a complete range of insurance policies
- Strong understanding of Director's & Officer's personal liability
- Perform third party contract reviews
- Offers training as well as insurance for cyber risks including data breach, wire theft, electronic signatures, and ransomware
- Deep Expertise in Lender Liability and Mergers and Acquisitions
- Unified CBIZ Professional Services: Employee Benefits, Payroll, Credit Risk Services, Retirement Plans, Executive Search, Tax & Accounting and more