

BANK



Local Services Supported By National Resources CBIZ Banking 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+ | Offices

300+ | Professionals

25,000+ | 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:



KRIS ST. MARTIN
763.549.2267
KStMartin@cbiz.com

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

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

Don't limit your bank to an off the shelf insurance policy. Our advisors conduct a comprehensive review of your insurance policies and perform an in-depth analysis of your potential risks. We identify the entire scale of your bank's exposures and provide custom options to help avoid, mitigate or transfer risk.

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

Contact us to find out if there are opportunities for improvement in your insurance and risk management program.

Areas of Expertise

- Placing Complete Range of Insurance Policies
- Conveying the Bank's Story to Underwriters
- Director's & Officer's Personal Liability
- Mergers & Acquisitions
- Cyber Risk Including Data Breach, Wire Theft and Electronic Signatures
- Lender Liability, including PPP Loans
- Publicly Traded Risks
- Organization Risk Management



CBIZ Insurance Services, Inc.

To learn more, visit us at [cbiz.com/insurance](https://www.cbiz.com/insurance).