



## Intact Financial Institutions | Our Capabilities

**We are highly trusted members of the business community. We protect Investment Managers, Lenders, Insurers, and other types of financial institutions against a broad range of professional and management liability exposures.**

Intact Financial Institutions is exclusively dedicated to protecting the liability risks and exposures uniquely faced by the financial institutions markets. Our specialized style features dedicated insurance professionals who are immersed in the financial institutions sector all day, every day. This expertise carries over to our suite of professional and management liability products expressly developed for financial institutions.

We have the ability to design creative solutions on both a primary and excess basis using both admitted and non-admitted coverage.

### Coverage

**We considers clients of all sizes, both public and private including:**

- Insurance companies
- Banks
- Insurance agents and brokers
- Investment advisors
- Mutual funds
- Hedge funds
- Real estate investment trusts
- Business development companies
- Venture capital firms
- Nonprofit financial institutions
- Mortgage bankers & brokers
- Finance companies
- Family offices
- Miscellaneous financial institutions

### Our capabilities include:

- Directors and officers liability (ABC and Side A/DIC)
- Professional liability
- Employment practices liability
- Fiduciary liability
- Employed lawyers liability
- Financial institutions bonds

### Financial Strength & Stability

Our solutions are backed by the financial strength of Atlantic Specialty Insurance Company, a subsidiary of Intact Financial Corporation, which is rated A+ (superior) by AM Best.

### Claims and Risk Control Services

Our claims team is focused on financial institutions and is committed to fairly expediting the resolution of your claims. This expertise provides the foundation for superior customer service experience suited to your sophisticated needs. The team is comprised of dedicated professionals who have extensive management and professional liability claim experience and marketplace relationships.

## Our claims services include:

- 24/7 claim reporting options
- Prompt and thorough claim investigations
- A specialty claims team with deep experience working exclusively on financial institutions losses

## Contact Us

---

### Alexander Ward

Director of Financial Institutions

Phone: 516.521.2413

[award@intactinsurance.com](mailto:award@intactinsurance.com)

### East Region

#### Deanna Butts

Assistant Vice President

Phone: 212.440.6511

[dbutts@intactinsurance.com](mailto:dbutts@intactinsurance.com)

#### Brian Machalek

Senior Underwriter

Phone: 212.440.6529

[bmachalek@intactinsurance.com](mailto:bmachalek@intactinsurance.com)

### Midwest and West Region

#### Kayla Carlson

Senior Underwriter

Phone: 312.821.4724

[kcarlson@intactinsurance.com](mailto:kcarlson@intactinsurance.com)

### Intact Financial Institutions Locations

#### One State Street Plaza

31st Floor

New York, NY 10004

#### 230 West Monroe St.

Suite 2810

Chicago, IL 60606

### About Intact Insurance Specialty Solutions

Throughout the United States, Intact Insurance Specialty Solutions' underwriting companies offer a broad range of specialty insurance products through independent agencies, regional and national brokers, wholesalers and managing general agencies. Each business is managed by an experienced team of specialty insurance professionals focused on a specific customer group or industry segment, and providing distinct products and tailored coverages and services. Targeted solutions include group accident and health; commercial and contract surety; entertainment; environmental; excess property; financial institutions; financial services; inland marine; management liability; ocean marine; public entities; technology; and tuition refund. For further information about U.S. products and services visit: [intactspecialty.com](https://intactspecialty.com).

Intact Insurance Specialty Solutions is the marketing brand for the insurance company subsidiaries of Intact Insurance Group USA LLC, a member of Intact Financial Corporation (TSX: IFC), the largest provider of property and casualty insurance in Canada and a leading specialty insurance carrier in North America. The insurance company subsidiaries of Intact Insurance Group USA LLC include Atlantic Specialty Insurance Company, a New York insurer, Homeland Insurance Company of New York, a New York insurer, Homeland Insurance Company of Delaware, a Delaware insurer, OBI America Insurance Company, a Pennsylvania insurer, OBI National Insurance Company, a Pennsylvania insurer, and The Guarantee Company of North America USA, a Michigan insurer. Each of these insurers maintains its principal place of business at 605 Highway 169 N, Plymouth, MN 55441, except The Guarantee Company of North America USA, which is located at One Towne Square, Southfield, MI 48076. For information about Intact Insurance Specialty Solutions products and services available in Canada, visit: [intactspecialty.ca](https://intactspecialty.ca) and for information about Intact Financial Corporation, visit: [intactfc.com](https://intactfc.com).



Visit [intactspecialty.com/financial-institutions](https://intactspecialty.com/financial-institutions) for more information.