Discover the Power of Tailored Excellence

Why Family Office Executives Turn to AssetSure for Personalized Risk Solutions

AssetSure®
Insurance that knows your worth

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As a family office executive, you are an expert in delivering the high-touch, high-quality service your clients expect as they entrust you with their present and their future. Your job, however, extends well beyond just the preservation of wealth to being a key resource for their many and varied needs. You need to be “at the ready” to answer questions, provide strategic advice, and manage their risk. This level of support often requires specialized knowledge and skill sets.

At AssetSure, we are well-versed insurance professionals, familiar with working with high-profile, private and dynamic families. We provide the same high-touch, personalized consulting and advisory service to our family office executive clients as you provide to your clients. We become an extension of your risk management team.

Work with a Partner that Knows Your Risk and Your Worth

Designing an insurance program explicitly to meet the needs of each family member’s lifestyle and personal risk exposure within and across the family is our specialty. We employ our experience across several critical areas where hidden risks often lie to build a tailored plan for your clients:

Professional Liability

Commonly referred to as errors and omissions (E&O) insurance, this type of policy is essential to protect your client from financial losses due to negligence, errors, or omissions in the provision of professional services. Given the diversity of the family office, we work collaboratively with our clients to understand their specific risks and consult on specialty coverages including, but not limited to, Trustee E&O, Lender Liability, and Management Liability such as Directors and Officers (D&O) coverage which protects family members serving on boards for business or philanthropic purposes. As the family office is a dynamic environment, we continually assess risk and proactively recommend solutions to make sure the right coverages and policies are in place.

Cybersecurity

Family Offices are prime targets for cybercriminals in today’s digital age. Proactively assessing your clients’ risk and reducing their exposure is a first step, but to truly manage their risk you need to ensure they are covered for investigation of breaches, data recovery, ransomware payments, and business continuity. And, you need to go beyond just coverage to education—help your clients avoid becoming victims of a breach in the first place. We offer resources for risk management, risk prevention and crisis management in the event of a cyber crime or event.

Real Estate

From multiple residences to vacation homes and office space, Family Offices have a wide range of properties in their portfolio. With natural disasters on the rise, ensuring that your properties are properly insured is critical. Putting proper protections in place for unattended properties could be the difference in securing more favorable rates. And, it’s important to consider any staff that might be onsite and cover any associated risks. With the right policy, you can transfer risk from the Family Office to an insurance policy for domestic staff or other staff involved in supporting the real estate portfolio.

Physical Assets

One of the more common areas of exposure, valuable family office assets are often improperly insured for damage, theft or loss creating a financial vulnerability. Vehicles, fine art, collections, and marine vessels should be protected not only financially, but also as important family possessions with personal meaning. Work with a partner that understands not only how to help you after a claim is made, but before to help you best protect assets.

Personal Security

Protection often goes beyond physical assets to people when a family office includes highly successful individuals. Managing the risks associated with kidnapping, extortion and other security threats should be considered as part of a customized insurance program.

Why AssetSure

As a family owned and operated business with over 50+ years of combined experience, we are uniquely positioned to understand the needs of the family office. Unlike publicly traded firms or other large global insurers, we are dedicated exclusively to our defined scope—the best interests of our clients and the professionals that manage their interests.

Concierge-Level Service: We provide personalized and tailored service to our clients—adapting to the dynamic and specific requirements of the family office and their unique risk profile.

Real-time Claims Servicing: We are available 24/7 for first claims response and consultation. Our team will not only support you during the claims process, we will also advocate on your behalf to ensure that you are receiving the best claims service and outcome possible.

Flexibility in Underwriting: We are experienced in accommodating complex situations, providing creative solutions for non-standard insurance needs.

Deep Industry Expertise: We have a deep understanding of the risks faced by the family office and can provide innovative approaches for dealing with those risks.

Nimble & Rapid Response: We don't have the bureaucracy that often plagues larger firms, allowing us to respond quickly and with more agility to policy adjustments.

Relationship Focus: We understand that the family office is all about relationships. We aim to build strong relationships with our clients, creating an environment of open communication and trust.

Global Reach: We work with an extensive network of financially secure, global insurers to deliver customized solutions to meet your clients' needs.

Insurance is a critical component of the family office risk management strategy. This is our specialty, and we can help you navigate the complexities and challenges of risk for your client. Knowing your clients are properly protected will allow you to continue to focus on protecting, growing, and managing your family office.

As your partner, AssetSure brings a holistic view, concierge-level service, and deep expertise to every engagement.

"AssetSure has been a game-changer for us by bringing the specialized knowledge we need, eliminating the need to build it internally. We are incredibly pleased with the level of service they have provided. They not only identified and rectified gaps others missed, but they have also ensured that the appropriate entities hold the right coverage, addressing all reasonable risks."

Cris B., Family Office 500M+

Why AssetSure

An independently-owned and operated business with over 50+ years of combined experience, we are uniquely positioned to understand the needs of financial advisors. Unlike publicly-traded firms or other large global insurers, we are dedicated exclusively to our defined scope: the best interests of our clients and the professionals that manage their interests. AssetSure provides property & casualty insurance for businesses, family offices and individuals.

"As a family office leader, I deal with complex and diverse financial matters daily. The AssetSure team helped me obtain professional liability insurance offering comprehensive and customized coverage for risks that may arise from my fiduciary duties, investment decisions, or regulatory compliance. They are very supportive and knowledgeable whenever I need advice or guidance. With the AssetSure team, I can manage my family's wealth with confidence and security."

Jeff M. Family Office AUM 250M+

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Property & Casualty Insurance for AssetSure, LLC, and its registered names is available in all states. CA license number 0D35067; MN license number 20299350, NPN 468-5313. AssetSure, LLC is independently owned and operated. Any questions, please contact info@assetsuregroup.com.

Questions?

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