



Securities Dealer Fidelity Bond

FINANCIAL INSTITUTIONS

Travelers offers securities dealers a special bond form, with competitive rates, which complies with the fidelity bond requirements of federal regulatory authorities. This Securities Dealer Fidelity Bond is issued through Theodore Liftman Insurance, Inc.

If this is not your area of responsibility, please forward this information to your insurance purchasing or compliance department.

Key features

- Competitive rates and deductible options for lower premiums
- Save \$\$ with an optional two-year bond – pay in two discounted annual installments
- Coverage includes Email Initiated Transfer Fraud and Social Engineering Fraud
- Non-aggregate bond – limits apply to each and every loss (except for certain coverages)
- Legal expense coverage provided in addition to the bond limit of liability (subject to a cap of 100% of the bond limit)
- Discovery basis bond with up to one year extended discovery period available
- Coverage for loss caused by partners (if a partnership)
- \$25,000 audit expense and \$5,000 fidelity claims expense coverage
- Coverage for unauthorized signatures of non-employees up to \$25,000 per loss and in the aggregate per year
- Credit/debit card forgery coverage
- Coverage for uncollectible items of deposit up to \$25,000 per loss and in the aggregate per year
- Computer systems fraud coverage including voice-initiated transfer, telefacsimile, virus and hacker coverage

Theodore Liftman Insurance, Inc.

FINANCIAL INSURANCE

Theodore Liftman Insurance, Inc.

Liftman Insurance Agency Co. (CA, NC, TX)

Liftman Insurance Agency (NY)

101 Federal Street, 22nd Floor, Boston, MA 02110-1827

617.439.9595 (p) 617.439.3099 (f)

Email: bond@liftman.com Website: www.liftman.com

- Coverage for dishonesty of employees and Independent Registered Representatives
- Coverage for named in-house pension and benefit plans is included at no additional charge up to your bond limit (subject to a \$500,000 cap)

Why Travelers

- We've provided effective insurance solutions for more than 150 years and address the needs of a wide range of industries
- We consistently receive high marks from independent ratings agencies for our financial strength and claims-paying ability
- With offices in every U.S. state, we possess national strength and local presence
- Our dedicated underwriters, risk control specialists and claim professionals offer extensive industry and product knowledge

travelersbond.com

Travelers Casualty and Surety Company of America and its property casualty affiliates. One Tower Square, Hartford, CT 06183

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