



Small Business Insurance Solutions for Financial Institutions

CNA brings over 20 years of expertise in serving small financial institutions and private equity firms. We collaborate with agencies to deliver customized property and casualty insurance solutions tailored specifically for the financial services industry.



Reasons to Choose CNA's Small Business Solutions

Our **Workers' Compensation** capabilities focus on providing protection to your client's most valuable asset – their workforce.

CNA Connect®, our flagship business owner's policy (BOP), provides the foundation for broad coverage for businesses with **up to \$30M in revenue**.

All FI/PE classes are available for self-quoting and binding in CNA Central without the need for underwriter referral based on class. Standard coverages for our financial institutions policies include:

- ✓ **Accounts Receivables** up to \$25K on and off premises
- ✓ **Computers, laptops, PDAs, software and data** up to \$50K on premises and \$25K worldwide
- ✓ **Damage to Premises Rented to You** automatic liability coverage of \$1,000,000
- ✓ **Business Income and Extra Expense** coverage includes electronic data processing equipment and electronic media and data as covered property, with only a 12-hour waiting period and on an Actual Loss Sustained basis
- ✓ **Employee Dishonesty and Forgery & Alteration** up to \$25K
- ✓ **Money and Securities** up to the Business Personal Property limit
- ✓ **Blanket Additional Insured – Liability Extensions**, which includes 11 types of additional insureds most commonly required per contract, along with blanket Waiver of Subrogation and Primary Non-Contributory, and Personal and Advertising Injury Extension for Discrimination and Humiliation
- ✓ **Identity Theft/Recovery** for business owners included at \$25K

Additional key CNA Connect® coverages available include:

- Cyber Liability via our Data Breach and Privacy Event Expense – available for all FI/PE classes
- Passport Access Endorsement to provide property and casualty coverage for firms with foreign travel
- Choice Extra provides a wide range of property coverage enhancements, including a \$250K blanket limit for specified coverages, at a nominal price

Small Business products available include:

- Workers' Compensation (monoline available)
- Commercial Auto
- Umbrella



Our Appetite

Our extensive appetite across the financial services spectrum enables agents to offer comprehensive solutions for a diverse range of businesses.

62111 Financial Planners – Consultants

Risks include providing advice on financial management topics; this class spans financial planners, investment advisors, investment bankers, asset managers (mutual/hedge fund managers).

67990 Investors

Private equity firms, venture capital firms, angel investors.

64112 Insurance Agents

Licensed professionals who sell insurance products on behalf of insurance companies.

62111 Commodity Brokers

Licensed professionals dealing in the buying and selling of financial commodity contracts (futures, options, and similar financial derivatives).

62111 Stockbrokers

Licensed professionals or firms in the business of buying and selling securities; they may operate as either a broker or dealer depending on the transaction.

65312 Title Agents, Abstractors and Closing Agents

Risks engaged in searching public records for titles and liens against property, preparing title abstracts, issuing titles, insurance policy, performing real estate closings or mortgage brokers.



CNA Highlights

125+

Years of
experience

7th

Largest U.S.
commercial insurer*

Financial Strength
Ratings:

A⁺

S&P

A

A.M. Best

A2

Moody's

A⁺

Fitch

Ready to learn more?

Email: sbsalesagency support@cna.com,

Call: 866-891-7247, option 1, or Visit: cna.com/smallbusiness

* S&P Global Market Intelligence as of 4/5/2024

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