



BOND & FINANCIAL PRODUCTS

FINANCIAL INSTITUTIONS



**Travelers SelectOne[®]
for Investment
Advisers and Funds
Count on us.**

A company with staying power

Since 1853, we've provided effective insurance solutions to address the complex needs of a wide range of businesses, and for more than 100 years we've supported the longevity of financial institutions. Our commitment to quality over the long term has made us one of the most respected companies in the United States. Add to this our ranking on the Fortune 100 list, as well as the consistently high ratings we receive from independent rating services, and it's easy to see why investment advisers and funds turn to us for customized insurance solutions.

Our history

1853

St. Paul Fire and Marine Insurance Company (The St. Paul) launches in Saint Paul, Minn., largely to serve local residents frustrated with slow service from distant insurers.

1863

The Travelers Insurance Company (Travelers) opens as the first company in America to insure travelers against loss of life or personal injury while traveling by railway or steamboat. Soon after, the company amends the charter to include accidents of all kinds.

1890

The company broadens its offerings to include insurance for financial institutions.

1929

In response to the stock market crash, the company begins offering financial institution fidelity coverages.

1964

The company is the first domestic carrier to offer directors and officers liability insurance.

2004

The St. Paul merges with Travelers to form the second-largest commercial property-casualty insurer in North America.

Today

Travelers continues to refine and expand its product line and services for financial institutions, helping them address their ever-changing needs.

Count on Travelers to protect your investment management company, so you can focus on building your business

To learn more about Travelers SelectOne[®] for Investment Advisers and Funds, contact your independent insurance agent or broker or visit travelersbond.com.



Travelers Casualty and Surety Company of America and its property casualty affiliates
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Committed to protecting investment advisers and funds

In today's complex and volatile securities market, businesses, organizations and individuals count on investment advisers and funds to help them make critical decisions about their finances. Whether its establishing a trust, building a financial plan or managing a portfolio of stocks, bonds and mutual funds, they know they can count on you to help them meet their financial goals and, ultimately, to help protect their assets.

Yet who supports the investment advisers and funds? Every day you face real business challenges — negotiating the unsteady economy, maintaining sound employee relations, developing additional sources of revenue and complying with state and federal regulations, just to name a few. These factors should be your concern, but worries about whether your organization and its employees are protected when something goes awry should not.



So investment advisers and funds can support their clients

Investment advisers and funds know they can count on Travelers

We designed Travelers SelectOne® for Investment Advisers and Funds, a portfolio of customizable insurance solutions, specifically to help investment advisers and funds meet their challenges with maximum assurance and minimal administrative demands on time and resources. Travelers SelectOne pairs our legacy knowledge of the insurance industry with more than a century of experience serving financial institutions to create products that evolve with the most recent investment management industry trends.

Customized protection for investment advisers and funds

Regardless of your size, we can tailor a portfolio of protection to meet your needs, including:

- Investment advisers professional liability
- Private equity firm professional liability
- Mutual fund liability
- Hedge fund liability
- Private equity fund liability
- Directors and officers liability (public or private)
- Employment practices liability
- Fiduciary liability
- Investment company blanket bond
- Fidelity bond

- Fiduciary dishonesty bond
- Crime
- Kidnap and ransom

Travelers SelectOne also includes options for:

- Identity fraud expense reimbursement for policyholder's customers and employees
- Mail exposures
- Surety bonds
- Property and casualty coverage
- Excess coverage for larger exposures

Dedicated to quality service and protection for investment advisers and funds

Investment advisers and funds throughout the nation turn to us for the protection they need to thrive in difficult times. We're confident that after learning more about our products and services, you'll choose Travelers, too.

Integrated services

At Travelers, we take an integrated approach to serving investment advisers and funds. Our underwriting and claim professionals will work together to ensure we provide the most efficient and effective solutions to promote the longevity of your business.

Knowledgeable underwriters

Our underwriters understand the complex and evolving issues faced by investment advisers and funds. They will use their knowledge and expertise in the financial services industry to design customized solutions for your company.



Experienced claim specialists

Our claim specialists know your business and the types of exposures you face. With their extensive experience working with investment advisers and funds, they will deliver prompt, knowledgeable service to help reduce the time and costs involved in resolving complicated claims.

Travelers SelectOne leverages our historic commitment to financial institutions, providing a customizable portfolio of coverages to meet the specific needs of the investment management industry.

