CO/ACTION®
SPECIALTY INSURANCE GROUP

PROFESSIONAL LINES SOLUTIONS

FINANCIAL INSTITUTIONS

Coaction Specialty® Financial Institutions team offers primary and excess professional lines coverages as well as lead A-Side DIC, blended Cyber and other types of professional liability coverages to a broad range of publicly traded as well as privately owned financial services organizations.

Who We Insure

All types of Financial Institutions with a specific focus on Asset Managers, Banks and Non-Bank Lenders, Insurance Companies, Alternative Asset Managers, Real Estate Investment Trusts, etc.

Product Offerings

Coaction Specialty's® excess liability form is designed as a simple follow form:

- *Primary private financial institutions' D&O, Employment Practices Liability, Fiduciary Liability, Fidelity Bonds, Bankers Professional Liability, Insurance Company Professional Liability, Miscellaneous Professional Liability (for diversified Financial Institutions)*
- *All Excess Liability Products*
- *Lead DIC*
- *Custom-made solutions for FINTECHs and INSURETECHs*
- *No minimum attachment or premium*
- *Dedicated In-House claims examiners with extensive experience*
- *No panel requirement*

KEY CONTACTS

Mary Henderson

SVP, Underwriting
B +1 973.532.6444
mhenderson@
coactionspecialty.com

Ryan Nava

VP, Head of Financial Institutions
M +1 917.434.7521
rnava@coactionspecialty.com

Target Classes

Coaction Specialty® insures a broad range of Financial Institutions, including:

- Asset Managers
- Banks and Lending Institutions
- Exchanges
- Family Offices
- FinTech Companies
- Hedge Funds
- Insurance Companies
- InsureTech Companies
- Private Equity and Venture Capital Companies
- Real Estate Investment Trusts

SUBMISSIONS

Send to: rnava@coactionspecialty.com

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Why Choose Coaction Specialty®?

Coaction Specialty® is an innovative specialty property and casualty insurer, providing a wide range of insurance solutions for companies across the United States. Our expertise and focus on excellence have made us a leader in the specialty insurance space.

Expertise

We deliver underwriting, claims, distribution and customer service experiences that help drive performance.

Claims Management

At Coaction Specialty® , we strive to provide an exceptional claims-handling experience to our clients. Our average claim adjuster has over 15 years of experience and are strategically aligned with our underwriting verticals to provide our insureds and claimants a specialized claims encounter.

- Expert claims team known for its quality, commitment, and integrity
- Engage with specialized investigative and litigation experts
- Industry-leading loss control services

To learn more, visit
www.coactionspecialty.com

Financial Strength

A-, (Excellent)*
Positive Outlook

$1.5B
2025 Premium

$861.3M
Policyholder Surplus

**by A.M. Best, Financial Rating & Size*

As of Dec 2025

- ✔ Licensed or eligible to write in all 50 states, DC and Puerto Rico
- ✔ Admitted and Non-Admitted Product Offerings

Expertise in

We have in-depth product knowledge, underwriting and claims expertise in the following verticals:

- Casualty
- Marine, Energy & Transportation
- Property
- Excess Casualty
- Professional Lines
- Entertainment
- Binding Authority

30+
Sub-Verticals

Policies are underwritten by the insurers of Coaction Specialty Insurance Group, Inc. (Coaction), which includes New York Marine and General Insurance Company, Gotham Insurance Company, and Southwest Marine and General Insurance Company. Policies may not be available in all jurisdictions. Actual coverage is specified in the policy issued.

Coaction, 412 Mt. Kemble Ave., Ste 300C, Morristown, NJ 07960.

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