

Chubb's Private Equity Industry Practice

Private Equity (PE) firms are growing their portfolios globally and more private companies have private equity firm dollars backing them. Chubb's Private Equity practice focuses on the holistic relationship versus one individual transaction. We have resources deployed to address the unique needs of Private Equity firms and their portfolio companies.

Key Highlights

- Over 15 years in the Mergers and Acquisitions/Private Equity space
- Design portfolio company insurance programs tailored to specific Private Equity firms
- Largest D&O portfolio carriers for Private Equity companies in North America (Validated through conversations with key broker partners)
- Global footprint to coordinate international transactions

World Class Services Offerings

- Dedicated Private Equity Practice Leaders
 - Provide Private Equity clients and brokers with a single point of contact into Chubb's global offering of products and services
- Dedicated Product Line Underwriters & Home Office Referral Executives who are specialists in their discipline and understand the nature of Private Equity
- Transactional Nature Obstacles
 - We understand the obstacles associated - quick timing, new company/management = new insurance programs needed, current insurance dislocation, limited underwriting information available
- Access to specialty products and international solutions
 - Easy and efficient access to all of Chubb's specialty products, including captive fronting, foreign programs, financial lines, transactional risk products, etc.
- Investment in Technology
 - Data review that permits tracking totality of the premiums with our Private Equity firms and their portfolio companies
 - Trading relationship with any Private Equity Firm
- Claims Coordination
 - Ability to assist with oversight and escalation of claims issues

Target Classes

ALL INDUSTRY CLASSES
with special focus on the following:

- Energy
- Financial Institutions
- Food
- Healthcare
- Life Sciences
- Manufacturing
- Retail
- Real Estate
- Transportation
- Technology

CHUBB SOLUTIONS

- "One team" approach to address pre- and post-close risks across various product lines, including primary, excess, and foreign casualty, property, financial lines, environmental and more.
- Identify existing relationships to create a pipeline of new opportunities and expand product breadth.
- Utilize international capabilities to support domestic and foreign Private Equity relationships.
- Strategic partnership with Internal Data Analytics & Pitchbook that permits tracking of total trading relationship.
- Transaction-specific insurance solutions covering, Reps & Warranties, Tax Indemnity, Contingent Liability; Environmental Liability; Loss Portfolio Transfers; and coordination with Credit Management Team.

What We Have Written Lately

Risk Description	Insurance Written	Premium Amount	The Chubb Difference
Investment firm focused on middle-market companies across the world of healthcare	<ul style="list-style-type: none"> D&O portfolio 	\$530,000	Provided consistent terms and conditions across the portfolio with tailored policy language that addressed the needs of the Private Equity firm.
Outpatient medical imaging provider	<ul style="list-style-type: none"> Auto Crime General Liability/professional Property Umbrella 	\$5,500,000	We were able to provide an insurance solution for all lines including property, which was appealing to have a one carrier play.
Infrastructure services provider primarily focused on maintenance, repair, upgrade, and new construction services for communications and electric utilities infrastructure	<ul style="list-style-type: none"> Auto General Liability Workers Compensation 	\$4,400,000	Our team took the private equity backing into account when designing the collateral requirements and were able to provide creative structure and policy language.

Web Links

- [Insurance for M&A and Private Equity](#)
- [Agent & Broker Resource Center](#)
- [Claims Service — What Makes Us Unique](#)



WHY CHUBB?

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| <ul style="list-style-type: none"> Underwriting Expertise Tailored Solutions | <ul style="list-style-type: none"> Risk Engineering Services Superior Claims Service | <ul style="list-style-type: none"> Global Reach Financial Strength |
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Chubb is the marketing name used to refer to subsidiaries of Chubb Limited providing insurance and related services. For a list of these subsidiaries, please visit our website at www.chubb.com. Insurance provided by ACE American Insurance Company and its U.S.-based Chubb underwriting company affiliates. All products may not be available in all states. This communication contains product summaries only. Coverage is subject to the language of the policies as actually issued. Surplus lines insurance sold only through licensed surplus lines producers. Risks subject to full underwriting review and acceptance; premiums may vary. Reasons listed for why an insured chose Chubb based on perceptions of Chubb employees from communications with producers. Chubb, 202 Hall's Mill Road, Whitehouse Station, NJ 08889-1600.