

NORTH AMERICA

Private Equity Practice



At Sompo, our Private Equity practice provides tailored insurance solutions designed to meet the evolving needs of Private Equity sponsors and their diverse investment portfolios. We understand the complexities tied to M&A and offer specialized coverage that safeguards against risks associated with these types of transactions.

Whether you need coverage for a bolt-on acquisition or require a more encompassing insurance solution for your entire portfolio, we can deliver. Employing a long-term vision of Private Equity, Sompo is a partner over the entire lifecycle of an investment. From diligence, through closing, and continuing post-transaction, our team brings deep expertise in navigating the unique risks faced by Private Equity firms, ensuring that your business remains protected across all stages, even as circumstances evolve.

Target Audience

- Manufacturing
- Real Estate & Hospitality
- Healthcare
- Life Sciences
- Financial Institutions
- Business Services
- Energy

Core Product Offerings:

- Management Liability Portfolio Solutions (D&O, EPL, Fiduciary)
- General Partnership Liability (GPL)
- Cyber Liability Programs
- Middle Market Package (GL, Auto, Worker's Compensation, Property, Umbrella)
- Commercial Casualty (Primary & Excess)
- Commercial Property (Primary, Shared & Layered)
- Healthcare Professional Liability (Medical Malpractice & General Liability)
- Specialty Products (Aviation, Ocean Marine, Energy, Environmental, Engineered Risk)
- Surety Contracts

Execution & Approach

- Middle Market focused approach
 - Closely aligns with broader Sompo initiatives and appetite
- P&C package capability
 - 1 underwriter, 5 products
- Dedicated underwriting teams focused solely on Private Equity
 - Product appointments by region and line of business
- Operational support
 - PE loss control team ensures on-site risk assessments are prioritized to meet deadlines
- Program Solutions
 - Comprehensive coverage for portfolio investments under a single consolidated structure
- Speed to market
 - Underwriters accustomed to M&A project work



Client Engagement

- PE specific policy language, designed to meet the evolving needs of our M&A clients
- Portfolio relationship managers assigned to optimize Sompo's full breadth of product and services
- Client level thought leadership on relevant risk related issues
- Holistic "Portfolio Approach" allowing Sompo to be a one stop shop for specialty insurance needs
- Singular point of contact – responsible for stewardship and relationship management

Value Added Services

MULTINATIONAL BUSINESS UNIT

Offers companies with business operations in multiple countries an industry-leading platform for managing risk. Leveraging licensing capabilities from Sompo companies around the world and a growing network of third-party partners, our Multinational platform offers a convenient, consistent approach to accessing global coverage that is compliant with local regulations in over 150 countries.

ASIAN RISK SOLUTIONS

With a collaborative approach and empowered underwriters, North America Asian Risk Solutions provides fully-serviced standard admitted products to our Asian clients with operations in the U.S., Canada and Mexico. As part of Sompo, we are pleased to provide our clients and distribution partners with an array of specialty products to complement our standard product offerings.

RISK CONTROL

With deep industry expertise entrenched across products and geographies, we lead with plan-based business strategies that assess and prepare clients for any dangers, hazards, or other potentials for disaster — physical or otherwise — that can impact their operations, reputation or financial stability.

- Portfolio relationship managers assigned to optimize Sompo's full breadth of product and services
- Client level thought leadership on relevant related issues

CLAIMS

Sompo is committed to providing outstanding claims service that delivers:

- Fair and appropriate outcomes for our insureds
- Efficient service, timely responses and fast payment of agreed claims
- Value-added expertise from product and industry specialists

We achieve this by establishing our claims team as an integral component of the underwriting process and aligning our claims professionals with each of our product lines and geographies.

With a focus on comprehensive, proactive solutions, we work hand in hand with our clients to ensure that their risk management strategies align with their investment objectives, providing peace of mind and enhanced financial security. Whether you're handling complex transactions or seeking tailored coverage to address specific risks, Sompo will be with you every step of the way.

About Sompo

We are Sompo, a global provider of commercial and consumer property, casualty, and specialty insurance and reinsurance. Building on the 135 years of innovation of our parent company, Sompo Holdings, Inc., Sompo employs approximately 9,500 people around the world who use their in-depth knowledge and expertise to help simplify and resolve your complex challenges. Because when you choose Sompo, you choose **The Ease of Expertise™**.

"Sompo" refers to the brand under which Sompo International Holdings Ltd., a Bermuda-based holding company, together with its consolidated subsidiaries, operates its global property and casualty (re)insurance businesses. Sompo International Holdings Ltd. is an indirect wholly-owned subsidiary of Sompo Holdings, Inc., one of the leading property and casualty groups in the world. Shares of Sompo Holdings, Inc. are listed on the Tokyo Stock Exchange.



Financial Rating:
A.M. Best (Superior)
S&P (Strong)