

# NonProfit ExecShield®

Let  
**Berkley Select**  
spring into action  
and be your  
**trusted partner.**



Working for a nonprofit organization is one of the most selfless, socially conscious choices you will ever make. The time, dedication, and sacrifices made to successfully lead a nonprofit do not go unnoticed. But just like any business, there are risks that can threaten the revenue, reputation, and existence of your nonprofit organization.

Berkley Select, a Berkley Company and leading provider of professional and executive liability insurance, introduces NonProfit ExecShield® - a flexible, custom liability policy designed to protect your nonprofit's individual directors, officers, employees, and assets from expenses arising from allegations of wrongful acts.

## WHAT IS AT RISK?

**NONPROFIT STATUS:** Inconsistencies in tax filings or allegations of mismanagement of donor funds can lead to the loss of tax exempt status.

**BOARD MEMBERS:** The ability to attract and maintain qualified board members may depend on the quality of the insurance protection.

**BUDGETS:** Lawsuits can subject your nonprofit and its directors and officers to costly defense expenses as well as settlements.

**REPUTATION:** Negative publicity brought about by investigations can lead to a compromised reputation.

## WHAT DOES EXECSHIELD® COVER?

**DIRECTORS AND OFFICERS LIABILITY:** Protects the leaders and the organization from allegations of failing to act in the best interest of the organization.

**EMPLOYMENT PRACTICES LIABILITY:** Protects the leaders and the organization from employee, volunteer, or client related claims of discrimination, harassment or retaliation type allegations.

**FIDUCIARY LIABILITY:** Protects the benefit plan administrator(s) from allegations of negligence in administering the plans as well as allegations of breaches of duties imposed by ERISA.

## THE BERKLEY SELECT WAY

- ◆ 24/7 access to a free risk management attorney-staffed helpline and online portal
- ◆ Dedicated in-house claims team and world-class legal representation
- ◆ Local, experienced agent to handle all policy inquiries and changes
- ◆ A+ rated financial stability provides the highest level of protection, guaranteed
- ◆ Flexible, custom coverage options allow you to adjust your policy to your business needs

If you'd like a quick indication, please complete the reverse questionnaire & submit to your agent.

Products and services are provided by one or more insurance company subsidiaries of W. R. Berkley Corporation. Not all products and services are available in every jurisdiction, and the precise coverage afforded by any insurer is subject to the actual terms and conditions of the policies as issued. Certain coverages may be provided through surplus lines insurance company subsidiaries of W. R. Berkley Corporation through licensed surplus lines brokers. Surplus lines insurers do not generally participate in state guaranty funds and insureds are therefore not protected by such funds.

For additional information concerning W. R. Berkley Corporation's insurance company subsidiaries, refer to [www.wrberkley.com/site-services/legal.aspx](http://www.wrberkley.com/site-services/legal.aspx).



Montana Nonprofit Association



| a Berkley Company

## Nonprofit Management Liability Insurance Questionnaire

Berkley Select offers an insurance program specifically designed for the unique liability exposures of nonprofit organizations. This program provides comprehensive Directors and Officers Liability Insurance and Employment Practices Liability Insurance with optional Fiduciary Liability.

The premium will vary based on total assets, number of employees, and activities of the nonprofit organization. Premiums start at \$400.

The application process is simple and is backed by a dedicated staff to service your policy.

**Please complete this questionnaire for a price indication. The contract for insurance is not valid until an application is accepted and the premium is paid.**

### GENERAL INFORMATION

Name of Organization \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP Code \_\_\_\_\_

Phone Number \_\_\_\_\_ Fax Number \_\_\_\_\_

Website \_\_\_\_\_

Description of Operations \_\_\_\_\_

Does your organization have 501(c) tax exempt status?  Yes  No  
If YES, under which IRSC section? \_\_\_\_\_

Primary Contact \_\_\_\_\_ Title \_\_\_\_\_

Primary Contact Phone Number \_\_\_\_\_

Primary Contact e-mail \_\_\_\_\_

Does your organization currently have Directors & Officers Liability Insurance?  Yes  No

Current Insurance Carrier \_\_\_\_\_

Expiration Date \_\_\_\_\_ Limit of Liability \_\_\_\_\_

Deductible \_\_\_\_\_ Premium \_\_\_\_\_

### YOUR ORGANIZATION'S OPERATIONS

During the last five (5) years, has your organization or any of its Directors, Trustees, and Officers or those proposed to be included on this insurance received any demands for monetary or nonmonetary relief, been involved in or had any knowledge of any civil or criminal action, administrative or arbitration hearings?  Yes  No

If YES, provide details: \_\_\_\_\_

Are any of your organization's Directors, Trustees, and Officers or those proposed to be included on this insurance aware of any fact, circumstance, or situation involving them that he or she has reason to believe may result in a claim?  Yes  No

If YES, provide details: \_\_\_\_\_

How many subsidiaries does your organization have? \_\_\_\_\_

What are total assets of your organization as of the most recent year-end? \_\_\_\_\_

Does your organization have a positive Fund balance (Total Assets - Total Liabilities)?  Yes  No

How many full-time employees - including independent contractors, does your organization have? \_\_\_\_\_

How many part-time employees does your organization have? \_\_\_\_\_

Is your organization a member of any professional organizations - including state associations?  Yes  No

If YES, list organization(s): \_\_\_\_\_

Organization's Authorized Signature

Title

Date