

Private Client Services

An overview for professional advisors

Leading family offices, wealth advisors, attorneys, accountants, and other professionals turn to Crystal & Company's Private Client Services to manage the insurance needs of affluent individuals and families like your clients. Our practice includes more than 75 professionals in 10 locations throughout the United States, and a 24/7 claims team. Licensed in all 50 states, our group has national capabilities and, through a partnership with Brokerslink, a global reach.

Why Refer To Us

Our mission is to protect your client's family, assets and legacy. Everything we do is informed by 80 years in the insurance industry—and our own experience as a family owned firm. We truly believe that in recommending our industry-leading risk management services, you will deepen your client's appreciation of your holistic approach to their financial security and wellbeing, resulting in a more trusting relationship.

With Crystal & Company, your client will experience the same unparalleled service and expertise that you deliver.

Benefits include:

- A personal—and efficient—relationship with an insurance professional
- Organized annual reviews
- Consistent communication and transactional support for policy changes or updates
- 24/7 claims support and advocacy
- Standardized service and consistency across all regions
- National and global capabilities
- Timely insights on insurance and risk

Foresight

EXPERTISE TO PREPARE FOR
THE EXPECTED, EXPERIENCE TO
ANTICIPATE WHAT'S NOT.

Creativity

WE DESIGN UNIQUE SOLUTIONS TO
MEET YOUR CLIENT'S SPECIFIC NEEDS.

Relationships

IN MOMENTS CALM OR
CHALLENGING, YOU AND YOUR CLIENT WILL
ALWAYS DEAL WITH FAMILIAR PEOPLE.

Shared Values

OUR THREE-GENERATION FAMILY FIRM
UNDERSTANDS THE IMPORTANCE OF
PROTECTING YOUR CLIENT'S LEGACY.

Peace of Mind

OUR BUSINESS IS REMOVING
UNNECESSARY WORRY
FROM YOUR CLIENT'S LIFE.

How We Help

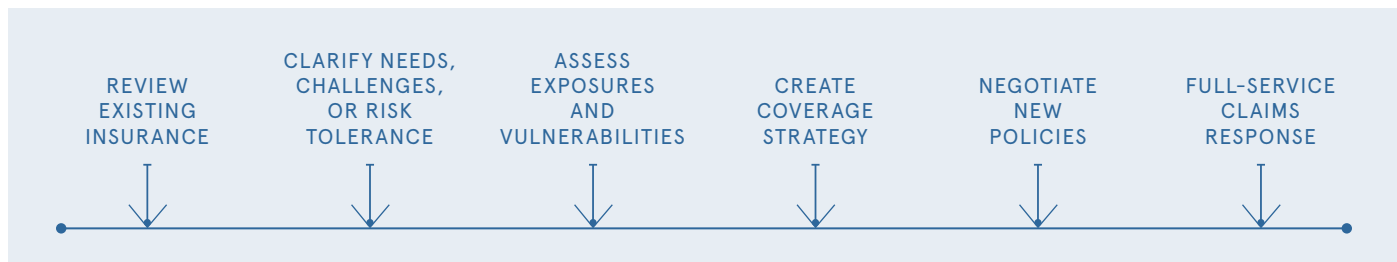
We partner with you and your client to manage all of the complex risks inherent in their life, in a clear and focused process that results in smart, customized solutions. The more than 6,000 families we assist represent a diverse set of pursuits, passions, occupations and concerns.

Our expertise includes:

- High-end homes and estates in the U.S. and abroad
- Directorship exposure through board sets
- Automobiles, exotic and antique vehicles
- Fine art, jewelry and other valuables
- Life insurance, wealth transfer and estate planning
- Events (charitable or milestone)
- Personal liability, protection of trusts, LLCs and family limited partnerships
- Yachts and private aircrafts
- Full or part-time domestic employees, including contractors, and vendors/service providers

Our Process

After reviewing any existing insurance programs, we'll ask your client about their financial goals, lifestyle, passions, challenges and comfort with risk. Next, we'll outline their exposure and vulnerabilities, and then help them make informed, strategic coverage choices. Finally, leveraging our deep market connections and technical expertise, we will negotiate effective programs to cover your client's assets and potential liabilities. Should your client experience a loss, your Crystal & Company team will respond rapidly and remain personally involved during the recovery effort, from mitigating damage to filing a claim through finalizing a settlement.



About Our Corporate Client Services

Crystal & Company is the home for talented insurance professionals: creative, committed to their clients and driven to deliver extraordinary results. The company drives the strategy and execution behind insurance and employee benefits programs for businesses that want to be smart about risk. Crystal & Company is the insurance brokerage of choice for leading financial institutions, corporations and non-profit organizations.

How much liability insurance is right for your client?

whatsmyliability.com

HEADQUARTERS

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OUR OFFICES

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