RISK strategies
PRIVATE CLIENT SERVICES
PART OF THE BROWN & BROWN TEAM

Identifying Threats to Private Client Wealth

Asking the Right Questions

Risk Strategies Private Client Services prepares families, and individuals to face a complex future with confidence. We partner with clients to improve resilience and minimize exposures to potential areas of increased risk and vulnerabilities.

Key Questions to Consider:

- Have you recently (last 3 years) had a **comprehensive review** of your personal insurance program?
- Do you currently **employ any domestic staff** (nanny, cleaner, gardener, house manager, etc.)?
- Do you and/or your family **travel internationally** for leisure or adventure?
- Do you or any members of your family sit on any f**or-profit or not-for-profit boards?**
- Do you own your **own business?**
- Do you own any **boats or yachts?**
- Do you fly private? Do you own a **plane or a fractional share of a plane?** Are you a member of a Private Jet Club?
- Do you have **Life Insurance** policies? If so, what type?
- Do you have **Flood Insurance** on your primary home? Secondary homes?
- Do you have **Earthquake Insurance** on your primary home? Secondary homes?
- Does your policy include **wildfire defense solutions?**
- Do you have **Cyber Insurance coverage** for you and your family?
- Do you have collections of **fine art, jewelry, memorabilia,** or other **collectables?**
- Are any of your assets or properties in the name of a **Trust or LLC?**
- Do you have an **Umbrella or Excess Liability policy?** Have you recently evaluated your policy limit?

For more insights and resources, visit:

Private Client Risk Resilience Center at
risk-strategies.com/privateclientresources

Learn More & Connect:

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