



EXCEPTIONAL RISK ADVISORS

ACCIDENTAL DEATH PRIVATE EQUITY MANAGING PARTNER

Client

The managing partner of a boutique private equity firm recently acquired by a prominent global investment firm.

Situation

In the intricate world of high-stakes investments, trust and security are paramount. As a condition of the sizable \$25 million majority investment made by the global firm, implementation of life insurance coverage on the managing partner was required. This insurance would serve as a protective shield for the substantial capital infusion.

Assessment

Due to the intricate nature of the acquisition and the swiftness with which it was executed, the advisor on the case was unable to secure fully underwritten life insurance within the required timeframe.

Solution

Recognizing the urgency of the situation, Exceptional Risk Advisors swiftly crafted a tailored strategy. They secured a \$25 million accidental death insurance policy with a 60-day term, strategically bridging the gap until a more comprehensive life insurance package could be assembled from various domestic carriers.

Result

With an immediate solution available, the investment firm could rest easy knowing that their substantial financial commitment was safeguarded in the event of an unforeseen tragedy befalling the key managing partner. This case exemplifies the critical role of innovative risk management solutions in preserving substantial investments and fortifying trust in the dynamic realm of private equity acquisitions.

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