



PRIVATE CLIENT SERVICES

# MARSH PRIVATE CLIENT SERVICES OVERVIEW

Marsh Private Client Services (PCS), a division of Marsh USA Inc., designs personal insurance solutions to protect our clients' unique lifestyles and help safeguard their legacies. Representing family offices and the clients they serve, we create innovative risk management strategies and act as our clients' advocate throughout the relationship.

## WHO WE ARE

Most people know Marsh as a leading provider of business insurance and risk management services; however, Marsh is also a leader in managing the personal insurance needs of affluent individuals and families through its Private Client Services (PCS) business. Marsh PCS helps affluent individuals, families, and single- and multi-family offices with substantial assets manage their personal risk, so they can protect and enjoy the lifestyle they have worked so hard to create.

Since 1980, Marsh PCS has utilized a unique risk management approach to help our clients manage their risks. Through this work we have developed unique insights into the risks that families of wealth face and the various solutions that can mitigate and manage those risks.

## INDUSTRY STRENGTH

Marsh PCS' established presence in the high-net-worth marketplace has enabled us to foster successful, long-term relationships with all of the key insurance companies who specialize in underwriting high-value assets. This results in competitive rates, terms, and coverage options for our clients. Robust relationships with the best insurance carriers, knowledge of industry issues, experience with the marketplace, and access to industry-leading global resources allow us to serve the family office community second to none.

## FAMILY OFFICE SERVICES

Marsh PCS has dedicated Family Office Specialists around the country who have the subject matter expertise required to understand the unique complexities and insurance needs of family offices and their clients. Our team includes an expert focused exclusively on the professional liability, management liability and D&O needs of single- and multi-family offices, foundations, private trust companies, and captives. Because of our deep and broad experience working in this arena, we have crafted insurance programs that span the spectrum from very traditional solutions to completely non-traditional solutions, including the use of captives.

## CONSULTATION, ADVICE, AND ADVOCACY

Through an in-depth, consultative process, Marsh PCS works with family offices to minimize the complexities of managing a family's exposures using insurance products and risk mitigation strategies that help protect the client's lifestyle, safeguard their legacy, and offer lasting peace of mind. Our Family Office Specialists conduct a comprehensive analysis of the family's current programs and contracts and provide personalized advice and alternatives when appropriate.

With input from the family office personnel, we then create a customized service model for the family with a focus on administrative and management ease. Our Family Office Specialists advocate on behalf of the family with insurance carriers to negotiate terms, pricing, and handling of claims. Throughout the relationship, we provide ongoing consultation, program review, and information sharing as well as additional valuable resources and thought leadership as needed.

**For more information about Marsh PCS, contact Diane Giles at 215 353 1730 or [diane.m.giles@marsh.com](mailto:diane.m.giles@marsh.com).**

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