



UNCOMMONLY INDEPENDENT

# Transaction Liability

*Market-leading advice & best-in-class service*



## *Accomplished leadership with a proven approach*

Lockton's Transaction Liability leadership team has been at the forefront of the transaction insurance industry for the past decade. Collectively, they bring more than 50 years of experience as both corporate attorneys and transaction liability advisory insurance brokers, specializing in private equity and corporate acquisitions across all industry sectors.

Prior to joining Lockton, our leadership team led the largest and most accomplished transaction liability advisory practice in the industry. We pride ourselves on being the first call for attorneys and deal professionals who understand the vital role that insurance capital can play in mergers and acquisitions (M&A) and other significant corporate transactions. No team is better equipped to handle your placement or policy claims, and no team has done more to innovate and drive the adoption of transaction insurance across the M&A landscape in North America.

## *A firm built to last*

Lockton's commitment to the transaction liability insurance space is unmatched in today's market. In an ever-changing insurance brokerage landscape with megamergers on the horizon and private equity-backed brokers trading with increasing frequency, clients should focus on long-term commitment and partnering with a team that will fight for their interests for the full life of their transaction liability policies and beyond. Our team has made long-term commitments to Lockton and to continuing the firm's 50+ years of being Uncommonly Independent®. You can count on the Lockton team negotiating your policy today being the same Lockton team supporting you for the duration of the policy period. **Lockton's independence makes us uniquely dependable for our clients' transaction liability insurance needs.**

## *Transaction liability insurance advisory*

We are committed to being more than brokers. When you bring us into your transactions, you can count on an advisor — one that will do everything in their power to streamline your deals and provide thoughtful guidance without introducing execution risk.

### **R&W insurance**

Our Representations and Warranties Practice has assembled a group of former M&A lawyers and industry veterans with unparalleled transactional experience. We employ a Partner/Associate model on every deal to ensure 24/7 coverage. We aim to identify potential issues before they arise, and we leverage years of transaction advisory experience to maximize our placement value.

### **Tax insurance**

Our market-leading Tax Insurance Practice includes both tax lawyers and former tax insurance underwriters, allowing us to provide not only sound substantive advice but also an unparalleled insight into the underwriting community's philosophy and appetite.

### **Litigation insurance**

Our Contingent Liability and Litigation Insurance Practice is led by a former litigator with years of experience investing and structuring litigation finance programs. We are dedicated to crafting bespoke solutions for these high-stakes exposures and leverage our team's unrivaled breadth of experience to do so for our clients.

### **Claims**

After your policy is bound, we are there with dedicated transaction liability claims experts who, in conjunction and collaboration with our placement team, guide you through the most pivotal moment in the lifespan of any insurance policy — a claim. We will shepherd you through your claim with real advice and counsel, bringing to the table the lessons learned in settling hundreds of millions of dollars of claims for our clients. We will be there with you every step of the way, helping you strategize for the best path for resolving complicated claims and leveraging our considerable market knowledge and expertise to optimize your claim's outcome.

# Transaction Liability key contacts

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