

CASE STUDY

AiK2 DELIVERED BETTER COVERAGE AT A LOWER COST

...AND ARG I DIDN'T EVEN NEED TO WASTE TIME FILLING OUT AN APPLICATION

ARGI came to AiK2 with disparate coverage: 5 E&O policies and a cyber policy that didn't include social engineering (the crime policy did, but it only provided coverage for one of the ARG I-owned CPA firms).

The inconsistent, incomplete coverage was further compounded by varying renewal dates and applications for each policy. In addition, the current policies had high premiums and retentions.

AiK2 took immediate action. With ARG I answering less than 10 questions and providing copies of its current policies, AiK2 presented several new coverage options. In the end, AiK2 created one consolidated E&O policy as well as an organization-wide cyber policy. The new policies had a centralized renewal date and reduced premium and retentions.

Results:

20%

in premium savings
(which equates to \$44,000)

33%

reduction in deductibles

COVERAGE

Broader, more
comprehensive



“

AiK2 made the insurance process easy for us. In the end, we have broader, more comprehensive coverage at a significant cost savings. I would recommend any RIA speak to AiK2.”

- Joe Reeves, CEO, ARG I

Source: AiK2.
NOTE: Case study for illustrative purposes only.
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