

AiK2 Insurance Services Proudly Adds New Client RFG Advisory

RFG Advisory, recognized as a Top 300 RIA by Financial Times, chose AiK2 for business insurance

MONTCLAIR, N.J. ([PRWEB](#)) March 21, 2023 -- Today, AiK2 Insurance Services (AiK2) announced the addition of a new client, RFG Advisory, a hybrid RIA firm headquartered in Birmingham, Alabama. According to Financial Times, RFG ranks in the [top 2% of Registered Investment Advisors \(RIAs\) nationwide](#).

Knowing the unique needs and exposure risks of wealth and asset managers, AiK2 leveraged key relationships with the nation's leading insurance carriers to provide better protection, lower deductibles, and more favorable terms for RFG. AiK2 dug into the details to consolidate policies and align term dates to be the most advantageous for the team. The highlight for our client came as we reduced their D&O and Fiduciary coverage deductible by 50% while simultaneously increasing their D&O coverage limits by a whopping 500%.

“AiK2 was built by advisors for advisors. We deeply understand the unique challenges wealth management firms face when it comes to securing comprehensive coverage. Firms like RFG deliver the technology, operations, compliance, marketing, back-office support, and coaching that advisors need, and have even greater demands for complete protection,” said John Phoenix, President of AiK2 Insurance Services. “Relying on our deep industry knowledge, we were able to advocate on behalf of RFG for custom solutions that more adequately cover their risks – all while saving them money and aligning policy dates for a more streamlined process.”

“To have a business insurance partner like AiK2 who understands the nuances of our industry and effectively mitigates our risk exposure has been beneficial from the start. With AiK2, we have an advocate fighting for the best blend of coverage and affordability out there for our unique position,” said Shannon Spotswood, President of RFG Advisory. “Managing everything in one place will not only save us time but allow us to stay focused on what's most important – our clients.”

Today, AiK2 is proud to maintain relationships with more than 170 clients, including wealth managers, asset managers, and family and multi-family offices, among many others. In total, we have more than \$135 billion total assets insured from the “what ifs” in the industry.

To see more ways AiK2 becomes a value-added partner in our client's success, please visit <http://www.aik2.com>.

About AiK2 Insurance Services

AiK2 Insurance Services provides comprehensive business insurance solutions, tailored just for the unique needs of wealth and asset managers. By focusing on providing unparalleled service, we make it simple, transparent, and cost-effective to insure and protect their most valuable asset—their firm. Please visit us at <http://www.aik2.com> or follow AiK2 on [LinkedIn](#) to see our latest insurance wins for clients nationwide.



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