



TRANSACTION LIABILITY

THE CERTAIN SOLUTION FOR TRANSACTIONAL RISK

From the earliest days of transaction liability (TL) insurance through its current widespread utilization, the members of the Lockton TL team have been the go-to call for dealmakers on their most material transactions.

No group of professionals has advised on more transactions than Lockton. This equips our team with market knowledge, leverage, and expertise to provide clients with the most effective advice for their deals, significant investments, and material risks.

SINCE 2021, LOCKTON'S TL TEAM HAS:

PLACED MORE THAN

\$2B

IN PREMIUM

BOUND MORE THAN

2,900

POLICIES

OBTAINED MORE THAN

\$81B

IN LIMITS

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.

WARRANTY & INDEMNITY INSURANCE

Our Warranty & Indemnity Practice is comprised of former M&A lawyers and distinguished industry professionals, each possessing extensive transactional expertise. We maintain continuous, round-the-clock engagement on all matters, ensuring seamless coordination and execution. Leveraging decades of transaction advisory experience, we proactively identify and address potential issues before they materialize, thereby safeguarding interests and optimizing placement value for our clients.

CONTINGENT RISK

The Contingent Risk Practice is a dedicated team that creates bespoke risk transfer solutions at the intersection of finance, legal risk, and insurance. The contingent risk team helps clients both manage and mitigate complex risks and also monetize and leverage intangible and contingent assets, like intellectual property and litigation assets.

TAX INSURANCE

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

CLAIMS

After your policy is bound, we are there with dedicated 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. We will bring the lessons learned in settling hundreds of millions of dollars of claims for our clients to the table. Lockton will be there with you every step of the way. We will help you strategize the best path forward for resolving complicated claims, and we will leverage our considerable market knowledge and expertise to optimize your claim's outcome.



Lockton's independence makes us uniquely dependable for our clients' transaction liability insurance needs.

ACCOMPLISHED LEADERSHIP WITH A PROVEN APPROACH

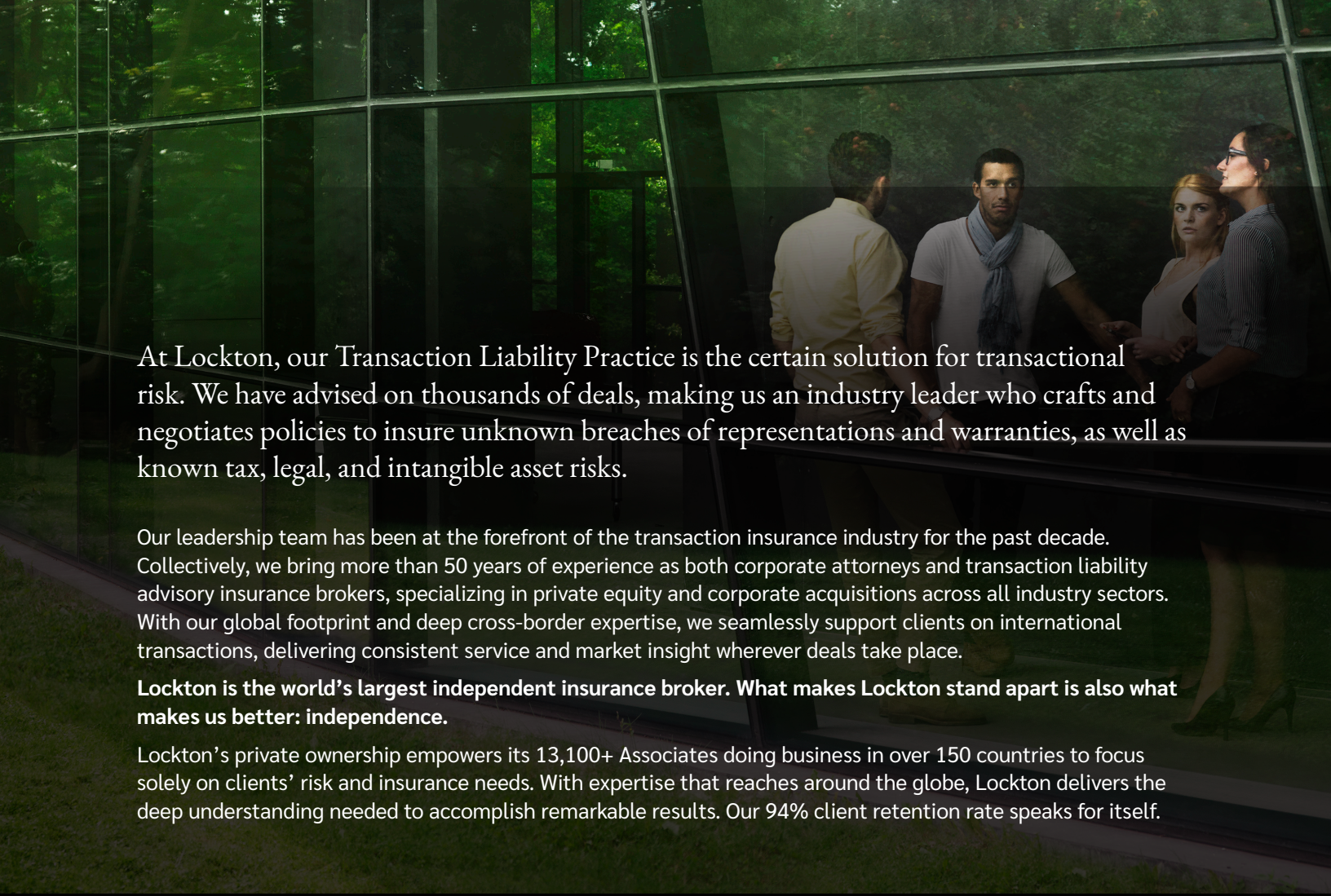
Prior to joining Lockton, our global leadership team led the largest and most accomplished transaction liability advisory practice in the industry. We pride ourselves on being the first call for attorneys and deal professionals who understand the vital role that insurance capital can play in mergers 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 global M&A landscape.

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 partner with a team that will fight for their interests for the full life of their transaction liability policies and beyond.

PUSHING THE INDUSTRY AHEAD

Our team has led the way in expanding the use of transaction liability products to new sectors and use cases. Minority investments, public M&A deals, secondary transactions, and real estate purchases were all afterthoughts for transactional insurance previously, but our team has crafted tailored approaches that have led to wider-spread adoption of insurance solutions and strategies in these historically underserved sectors. As risks evolve in M&A, our practice will evolve too — we welcome all calls from clients facing novel issues and looking for ways to de-risk them using insurance.



At Lockton, our Transaction Liability Practice is the certain solution for transactional risk. We have advised on thousands of deals, making us an industry leader who crafts and negotiates policies to insure unknown breaches of representations and warranties, as well as known tax, legal, and intangible asset risks.

Our leadership team has been at the forefront of the transaction insurance industry for the past decade. Collectively, we 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. With our global footprint and deep cross-border expertise, we seamlessly support clients on international transactions, delivering consistent service and market insight wherever deals take place.

Lockton is the world's largest independent insurance broker. What makes Lockton stand apart is also what makes us better: independence.

Lockton's private ownership empowers its 13,100+ Associates doing business in over 150 countries to focus solely on clients' risk and insurance needs. With expertise that reaches around the globe, Lockton delivers the deep understanding needed to accomplish remarkable results. Our 94% client retention rate speaks for itself.

NORDIC REGION LEADERSHIP

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GLOBAL LEADERSHIP

The Transaction Liability Partners bring **50+ years** of collective transaction liability and M&A dealmaking experience and expertise.

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UNCOMMONLY INDEPENDENT

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