



# Private Client Services

An Overview for Professional Advisors

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# Why Refer to Us

**Our mission is to protect your client's family, assets and legacy.**

Everything we do is informed by 80 years in the insurance industry—and our own experience as a previously owned family firm. We truly believe that in recommending our industry-leading risk management services, you will deepen your client's appreciation of your holistic approach to their financial security and wellbeing, resulting in a more trusting relationship.

With our team, your client will experience the same unparalleled service and expertise that you deliver.

**Benefits include:**

- A personal—and efficient—relationship with an insurance professional
- Organized annual reviews
- Consistent communication and transactional support for policy changes or updates
- 24/7 claims support and advocacy
- Standardized service and consistency across all regions
- National and global capabilities
- Timely insights on insurance and risk

## Foresight

Expertise to prepare for the expected, experience to anticipate what's not.

## Creativity

We design unique solutions to meet your specific needs.

## Relationships

In moments calm or challenging, you will always deal with people you know.

## Shared Values

Rooted in three-generations of ownership, we understand the importance of protecting legacies.

## Peace of Mind

Our business is removing unnecessary worry from your life.



# Our Process & How We Help

### OUR PROCESS

After reviewing any existing insurance programs, we will ask your client about their financial goals, lifestyle, passions, challenges and comfort with risk. Next, we will outline their exposure and vulnerabilities, and then help them make informed, strategic coverage choices. Finally, leveraging our deep market connections and technical expertise, we will negotiate effective programs to cover your client's assets and potential liabilities. Should your client experience a loss, your private client team will respond rapidly and remain personally involved during the recovery effort, from mitigating damage to filing a claim through finalizing a settlement.

### HOW WE HELP

We partner with you and your client to manage all of the complex risks inherent in their life, in a clear and focused process that results in smart, customized solutions. The more than 8,000 families we assist represent a diverse set of pursuits, passions, occupations and concerns.

### Our expertise includes:

- High-end homes and estates in the U.S. and abroad
- Fine art, jewelry and other valuables
- Automobiles, exotic and antique vehicles
- Yachts and private aircrafts
- Equine, farm and ranch
- Life insurance, wealth transfer and estate planning
- Personal liability, protection of trusts, LLCs and family limited partnerships
- Full or part-time domestic employees, including contractors and vendors/service providers
- Events (charitable or milestone)
- Directorship exposure through board seats

1  
REVIEW  
EXISTING  
INSURANCE

2  
CLARIFY NEEDS,  
CHALLENGES, OR  
RISK TOLERANCE

3  
ASSESS  
EXPOSURES &  
VULNERABILITIES

4  
CREATE  
COVERAGE  
STRATEGY

5  
NEGOTIATE  
NEW  
POLICIES

6  
FULL-SERVICE  
CLAIMS  
RESPONSE

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# About Us

Leading family offices, wealth advisors, attorneys, and other professionals turn to us to manage the insurance needs of their affluent clients.

The blend of Alliant's national strength with Crystal & Company's long standing reputation, created our dynamic team with unrivalled insurance expertise. Crystal, Alliant Private Client crafts customized insurance programs for affluent individuals and families who require a sophisticated approach to personal risk management. Our elevated technical expertise and market relationships allow us to deliver the best holistic programs for our clients and their lifestyles.

Located throughout the country, we have 100+ professionals (licensed in all 50 states) and a 24/7 dedicated claims team. While our footprint is national, our capabilities are global through our strategic partnership with Brokerslink.

## More about Alliant Insurance Services

Alliant is one of the nation's leading and fastest growing distributors of diversified insurance products and services. We operate through a network of specialized national platforms and regional offices to offer a comprehensive portfolio of services for our clients.



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**How much liability  
insurance is right for you?**  
[www.whatsmyliability.com](http://www.whatsmyliability.com)

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