

UNISON

RISK ADVISORS

oswald

RCM&D

NSI
INSURANCE
GROUP

ENDERS
INSURANCE FINANCIAL BENEFITS

AVONDALE

Assurex
GLOBAL

WE SEE RISK SO YOU SEE OPPORTUNITY

Capital Markets Advisory Services

The URA M&A and Capital Markets practice provides risk management advisory services and solutions to public companies, investment banks, private investors, and other acquisitive groups across the globe.

We provide pre-IPO due diligence for employee benefits, property & casualty insurance, non-qualified and qualified retirement plans, life insurance and continue to advise post-IPO.

Our group has decades of experience placing insurance around an IPO. Specifically, Directors & Officers Insurance, Executive Risk including Cyber, and Professional Liability. We have designed a Capital Markets Blueprint for our clients to seamlessly review their risks and coverages as they go through the IPO process.

Although not every solution is a fit for every client, we still educate clients on what options are available to them, and at what cost.

DUE DILIGENCE

- Property & Casualty
- Employee Benefits
- Retirement Plan Services
- Compliance (ACA, ERISA, DOL, OSHA)
- Human Resources/Human Capital

IPO COVERAGES

- Directors & Officers/Management Liability
- Environmental Liability
- Tax Liability, Contingent Liability Insurance
- Cyber Liability
- Representations & Warranties Insurance

POST-IPO SERVICES

- Implementation of Due Diligence Findings
- Innovative & Value Driving Strategies
- Consistent Best-In-Class Service
- Technology & Back Office Support



UNISON

RISK ADVISORS

We believe clients are best served by independent risk advisory firms
URA Perpetuates Our Independence Through Partnership & Employee Ownership

By the Facts

Top 5

Largest independently owned firms in the U.S.

50 States

We operate in every state in the U.S.A.

100+ Countries

We serve clients in over 100 countries worldwide

40,000+

Personal & business clients

Ohio (HQ) • Kentucky • Michigan • Pennsylvania • Illinois • Maryland • Washington D.C. • Virginia • North Carolina • Florida • Massachusetts • Vermont

Contact me

to learn more about URA's
Capital Markets capabilities



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