

# Financial institution industry

A proven, effective approach to risk management  
and employee benefits

## What we do

Marsh McLennan Agency (MMA) provides business insurance, employee health & benefits, retirement, and private client insurance solutions to organizations seeking limitless possibilities. With over 15,000 colleagues and 300+ locations, MMA is dedicated to helping financial institutions minimize risk and maximize health.

## In addition

Our team brings deep industry expertise to insure and advise clients across various facets of the banking industry. MMA's Financial Institutions Practice serves over 350 clients and manages more than \$31 million in placed premiums. Our clients include:

- Retail and commercial banks
- Credit unions
- Investment banks
- Asset management companies
- Private equity firms
- Savings and loan associations

## Specialty solutions

At MMA, we recognize that every business is unique, and there is no one-size-fits-all approach. Our solutions are customized to address your specific exposures, ensuring appropriate coverage aligns with your risk profile. Whether you are looking for voluntary benefits options to attract and retain talent or professional liability coverages to protect your leadership, our team has the depth of market relationships to make a difference for your daily operations.



## Learn more

Paul Haas, Vice President  
317.442.2469  
[Paul.Haas@MarshMMA.com](mailto:Paul.Haas@MarshMMA.com)

**[MarshMMAMidwest.com](https://www.MarshMMAMidwest.com)**

d/b/a in California as Marsh & McLennan  
Insurance Agency LLC; CA Insurance Lic:  
0H18131. Copyright © 2025 Marsh & McLennan  
Agency LLC. All rights reserved. [MarshMMA.com](https://www.MarshMMA.com)



### Protect your assets

- Cyber liability
- Directors' & officers' liability
- Real estate owned (REO) coverage
- Mortgage Impairment
- Bank owned life insurance



### Safeguard your operations

- Cyber risk detection, prevention, and interactive tabletop exercises
- Merger and acquisition diligence and support
- Outsourced insurance tracking (CRE/RE)
- Mortgage E&O
- Outsourced trust insurance management
- Digital asset guidance and protection



### Care for your people

- Culture and inclusion programs
- Global benefits management
- Health and wellness consulting
- In-house legal and compliance support
- Benefits Administration and voluntary benefits programs



A business of Marsh McLennan

# Your future is limitless.<sup>SM</sup>

---

Business Insurance

Employee Health & Benefits

Private Client Services

Retirement Services

---

[MarshMMAMidwest.com](https://MarshMMAMidwest.com)

This document is not intended to be taken as advice regarding any individual situation and should not be relied upon as such. Marsh & McLennan Agency LLC shall have no obligation to update this publication and shall have no liability to you or any other party arising out of this publication or any matter contained herein. Any statements concerning actuarial, tax, accounting or legal matters are based solely on our experience as consultants and are not to be relied upon as actuarial, accounting, tax or legal advice, for which you should consult your own professional advisors. Any modeling analytics or projections are subject to inherent uncertainty and the analysis could be materially affected if any underlying assumptions, conditions, information or factors are inaccurate or incomplete or should change. d/b/a in California as Marsh & McLennan Insurance Agency LLC. Copyright © 2025 Marsh & McLennan Agency LLC. All rights reserved. MarshMMA.com