

Our Private Equity Practice

A proven, effective approach to risk management for private equity firms and their portfolio companies.

Who we are

The Marsh McLennan Agency Private Equity Practice is a team of specialized professionals with several years of M&A and due diligence experience who have advised on thousands of transactions. Our team understands the complexities of the industry along with the aggressive time constraints. Our expertise in developing solutions for private equity and M&A gives us the market leverage necessary to implement appropriate risk strategies for organizations. We take a wholistic approach to ensure continuity across our private equity client's entire portfolio. Our practice works closely with our service teams to ensure a seamless transition post-closing.

Our due diligence practice offers:



Comprehensive commercial insurance, employee benefits and retirement due diligence services



An integrated approach where all disciplines work together as one team to provide a full range of services



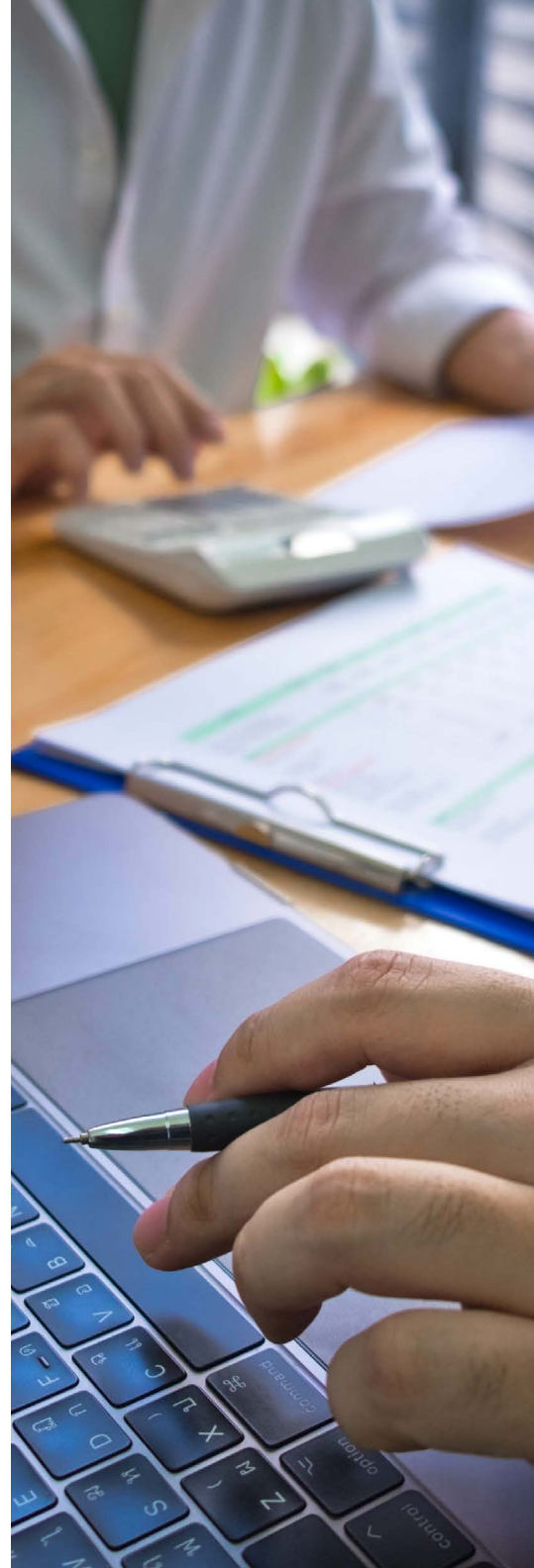
Coordination with other diligence advisors on material deal issues



Post-close insurance and benefits solutions to minimize risk and maximize return on investment





Consultation in conjunction with our Transaction Liability team to facilitate the placement of representations and warranties insurance, as well as contingent and tax liability, if applicable



Learn more

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Below you will find some of the key services our team will provide your organization.

 Business Insurance	 Employee Health & Benefits
Review current and historical business insurance programs to identify coverage gaps or inadequacies and place new policies where appropriate, as well as verify carrier solvency	Review plan designs and costs compared to benchmarks/ industry standards
Compare premiums, projected losses and loss accruals to the income statement/ balance sheet and provide an estimated post-closing insurance budget for pro forma financials	Estimate cost projections and proformas for all health, welfare, and retirement benefits to confirm the benefits costs and balance sheet
Evaluate loss history and potential liability for any open claims	Estimate pre-close accrual liabilities for self-funded plans
Review surety obligations and the potential impact on the bonds as a result of the transaction and any collateral/indemnity requirements	High level ACA and ERISA Compliance review
Make recommendations with respect to tail coverage for any claims-made policies	Place Key Person insurance, if needed

Learn more

To learn more about how MMA's Private Equity Practice can assist your firm with due diligence during your next transaction and ensure your portfolio companies are adequately insured, reach out to your current MMA representative or a member of the Private Equity Practice.



A business of Marsh McLennan

Your future is limitless.SM

Business Insurance

Employee Health & Benefits

Private Client Services

Retirement Services

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