ClientSide Risk Advisory

Insurance should be the final step, not the goal.
Your advocate in the fine print.

THE PROBLEM WE SOLVE

Effective risk management begins long before insurance is purchased. We ensure all the pre-sale risk management work is completed correctly. Insurers do not pay more commission to those who analyze contracts or develop risk mitigation practices or transfer risk before submitting to carriers.

WHO WE SERVE

High-Net Worth and Ultra-High Net Worth Individuals, Families and Wealth Advisors

EXPERTISE

- Insurance Cost Reduction Strategies
- Pressure-Test Coverage & Claims Guidance
- Liability Insulation & Asset Protection

WHO YOU'LL WORK WITH

Daniel Seltzer, CPCU

Chartered Property Casualty Underwriter with 40+ years of insurance and risk management experience

HOW WE'RE DIFFERENT

- Independent advisory
- Fee-based, no commissions
- Always on your side of the table
- Every policy read, line by line
- Direct access to Dan, no hand-offs

Most Brokers Are Trained To Sell First

ClientSide Risk model

	ClientSide	Traditional
01 **Assess exposures**	✓	✓
02 **Risk mitigation & control**	✓	*Skipped*
03 **Study agreements & covenants**	✓	*Skipped*
04 **Transfer risk via contract**	✓	*Skipped*
05 **Insure what remains**	✓	✓
THE RESULT	Comprehensive program on a solid foundation	Policy placed, risks not fully vetted

WHAT CLIENTS SAY

"Dan advocated … led to a claim settlement over five times the initial offer. Huge difference from the typical broker … will never use anyone else"

"For over 30 years, Daniel has served the needs of my husband and I, as well as our grown children, and our various family related businesses … he truly understands the importance of discretion and will always be our trusted advisor."

More client stories at ClientSideRisk.com

Schedule a confidential coverage review

Daniel Seltzer, CPCU
215-913-5355 dseltzer@ClientSideRisk.com ClientSideRisk.com