



Transactional Liability

At Optio, we continue to specialise in the provision of W&I for transactions in the SME space and have a proven track record for both innovation and first-class service levels. With a wealth of experience across a number of jurisdictions and sectors our transaction liability offering has become an essential tool for those deal professionals operating in the small to mid-cap space.

Optio will always work closely with brokers to ensure best-in-class service, developing insurance solutions that are relevant, comprehensive, and affordable to meet the client's needs.

650+

deals in the SME space alone

30+

years combined M&A experience

SME

Single core product with sole focus on the SME market

Key Features



Limit of Liability: up to GBP/EUR 26.5m (or currency equivalent)



Jurisdictions: European focus, including UK (particular interest in UK Regional M&A) Nordics, DACH (limited appetite in Germany at present), Benelux and Iberia.



Transaction Values: our primary focus remains on transactions with an EV of GBP/EUR 120m (or currency equivalent) and we will also consider transactions with an EV of up to GBP/EUR 150m on a case-by-case basis. We do not write XS.



No mandated underwriting calls: we do not require an underwriting call as part of our processes.



Retention: nil excess for operational transactions (i.e. Real Estate, Renewables etc.)



Insureds: both sell-side and buy-side policies available. Traditional sell-side with no VDD is available.



Security: 100% Lloyds of London A rated capacity



Sectors: broad sectoral appetite, including financial services



Fundamental Warranties: nil excess for title and capacity warranties on all transactions.



Synthetic Coverage: available on a case-by-case basis for an additional premium.



Policy Period: maximum of 7 years

Contact Us:



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