



# Manage My Risk

**Proactive protection.**  
**Real business tools.**

## Beyond Coverage: Turning Risk Into Confidence

Empower your clients to be **safer, stronger, and more resilient** with Coterie's **Manage My Risk** program. Designed for the unique challenges of their industries, it provides tools, expert guidance, and resources to help businesses **spot and prevent risks**—so they can move forward with confidence.

## Why add Manage My Risk?

As an insurance agent, you want more than just a policy for your clients—you want to offer **lasting value**. Manage My Risk is built into Coterie policies to give small businesses the **tools, insights, and support** they need to thrive



## The Agent Advantage:

- **Differentiate your offering** – Provide a unique, value-add resource that goes beyond the policy.
- **Strengthen client loyalty & build trust** – Give businesses tangible tools that make insurance feel like partnership, not just protection.
- **Boost retention & referrals**– Positive results create satisfied clients who remain engaged and spread the word.

## What's Included with Manage My Risk?

Discover the trusted partners and resources included in the **Manage My Risk** program. Each offers tools, insights, and exclusive benefits designed to help your clients **strengthen their business and reduce risk**.



Quick risk assessments, personalized plans, subsidized premium upgrade for as little as \$100 as a Coterie Manage my Risk policyholder.



Flexible business banking and credit lines to keep cash flowing—no monthly fees, unlimited transactions, and the ability to earn interest.



Business credit snapshots, funding options, Nav Prime upgrade to boost credit scores.



Access 100+ safety training modules: construction, hazard, food safety & more.



Up-to-date OSHA information, downloadable safety guides, compliance checklists.

## How to Sell Manage My Risk

Present Manage My Risk as more than coverage — it helps clients stay safe, compliant, and strong. Be a partner in their growth, and share success stories, like the restaurant owner who lowered their risk score with a SmarterRisk assessment.

### Bottom Line for Insurance Agents:

Manage My Risk helps you win more clients, deepen relationships, and retain business—all while delivering real-world tools that small businesses value

### Additional Resources

Can be found on our website. [Learn more!](#)



## Contact & Support

Email: [support@coterieinsurance.com](mailto:support@coterieinsurance.com) or call 855-566-1011.

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