



Manage My Risk

Tools That **Protect, Save,**
and **Support** Your Business

Why Manage My Risk Matters

Your insurance policy doesn't just protect you when things go wrong—it can also help you **prevent problems before they happen**. That's what Manage My Risk is all about.

When you keep Manage My Risk bundled with your policy, you'll receive:

- **Peace of Mind** – Resources to help you stay compliant, safe, and financially strong.
- **Ongoing Support** – Tools that you can use all year, not just at renewal time.
- **Professional Insight** – Access to platforms that provide practical knowledge.

What's Included with Manage My Risk?



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

- 15-minute digital assessment.
- Personalized plan to reduce business risks.
- Subsidized upgrade available for advanced tools.



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

- View your credit health and funding opportunities.
- No hard credit check.
- Nav Prime upgrade can help improve your score in as little as 3 months.



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

- Flexible banking built for small businesses.
- Credit lines that help you manage cash flow and growth.



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

- 100+ training modules covering workplace safety, food handling, construction, and more.
- Accessible anytime for you and your team.



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

- Up-to-date compliance guidelines.
- Downloadable safety checklists and guides.

How It Works

- 1 Included at Quote** – Your agent adds Manage My Risk to your policy.
- 2 Get Access** – Within 24-48 hours, you'll receive login details and further information. Check your inbox and spam folder.
- 3 Start Using Tools** – Take your risk assessment, explore financial insights, and use training resources right away.



The Bottom Line

Manage My Risk helps you save money while protecting your business with tools you'll use. It's built into your policy—keeping it as part of your policy means you get more value, more support, and more peace of mind every day.



Contact & Support

Email: managemyrisk@coterieinsurance.com or **Call:** 855-566-1011.

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