

Tax US

TRANSACTIONAL LIABILITY



Businesses can face myriad sources of tax uncertainty from M&A, financing, restructuring, or ordinary-course transactions. Ambiguity in the law stands in the way of dealmaking, and governments hungry for revenue may aggressively challenge close questions. Tax-liability insurance from Mosaic offers certainty to enable an internal transaction, improve a balance sheet, allocate risk between deal parties, or insure the availability of renewable-energy tax credits. Our expert underwriting team delivers market-leading tax liability insurance solutions.

KEY FEATURES

Up to

\$50M capacity per risk



Robust global team of experienced specialists

- Global team launched in 2021, with years of professional experience as underwriters and advisors
- Scale and security of Lloyd's, with the market's global license network and financial-strength ratings
- Underwriting for jurisdictions around the globe, insuring risks in close to 20 countries
- Global platform, working across regions with a single mission: collaboration to tailor solutions to policyholders' needs

PRODUCTS & APPROACH

With deep experience evaluating and underwriting transactions and structures across industries and around the world, Mosaic's tax team can tackle novel issues and structure the bespoke tax insurance solution best suited for each scenario. Our services include:



Fiscal planning:

coverage for potential taxes from identified and uncertain risks when there is no clear precedent or guidance from taxing authority



M&A solutions:

unlocking deals for buyers and sellers unwilling to retain risk of target's tax position or treatment of transaction structure



Renewable energy:

coverage for developers, tax-equity investors, and tax-credit buyers supporting investment in and operations of renewable energy projects, advanced technology manufacturing, and carbon capture projects

Underwriting



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Meet our full
Transactional Liability team

Claims

Proactive claims management by specialists is at the heart of every risk we cover. Fair handling of claims, and quick payment where agreed, is our promise. Our technically experienced in-house experts provide coverage analysis, strategic overview, and legal and data-driven insights, with continual feedback to our underwriting teams. Claims and underwriting teams work closely together to ensure we meet the needs of our clients. Mosaic's approach is one of ownership, transparency, and efficiency; achieving fair outcomes for our customers is the end goal. Mosaic has full authority on claims settlement decisions.



NATALIE GRAHAM

Global Head of Claims



HEIDI RYAN

VP, Transactional Liability
Claims, Americas

About Mosaic

Mosaic is a global specialty insurance platform with an innovative structure allowing deployment of different forms of capital aligned for the benefit of clients and partners. We underwrite for 40 other top-rated carriers alongside our Lloyd's syndicates 1609 and 2610—offering lead-line + syndicated capacity, and claims-settlement authority across eight product lines via seven countries. We harness the heritage of Lloyd's and benefit from the market's global licenses and financial-strength ratings.

Visit mosaicinsurance.com and follow us @Mosaic1609

A+
Superior

AM Best

AA-
Very Strong

Standard & Poor's

AA-
Very Strong

Fitch Ratings

FINANCIAL-STRENGTH RATINGS OF OUR LLOYD'S SYNDICATES MOSAIC 1609 & 2610

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