

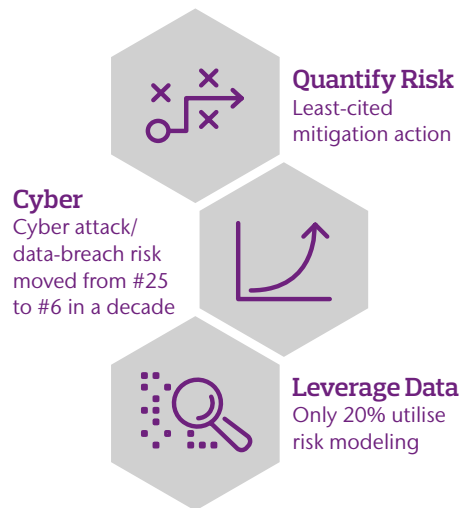
Financial Institutions Industry Insights

Aon's 2019 Global Risk Management Survey

Policy changes, geopolitical conflicts, volatile financial markets, and overall industry disruption: from regulations through to digital transformation, risks vary across industries. Further, risk readiness has dipped to the lowest reported levels in over a decade. To navigate these significant shifts, industry-sector-specific insights are key for risk advisors, brokers and insurance executives.

Aon's Global Risk Management Survey is designed to offer organisations the insights to compete in an increasingly complex environment.

Which risks are on the horizon and how are leaders preparing for the unknown?



Top 10 Risks for the Industry



Looking Ahead to 2022

- Cyber Attacks/Data Breach
- Accelerated Rates of Change in Market Factors
- Economic Slowdown/Slow Recovery

To learn more, visit aon.com/2019GlobalRisk

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Risk Readiness: How Prepared Are You?

How Organisations Evaluate Their Risk Posture



Top 3 Factors When Choosing an Insurer

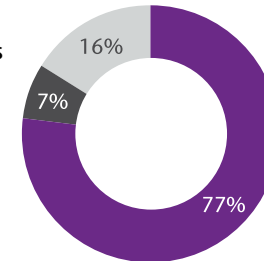
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|--------------------------------------|---------------------------------------|------------------------------|
| 1 Coverage Terms & Conditions | 2 Financial Stability & Rating | 3 Industry Experience |
|--------------------------------------|---------------------------------------|------------------------------|

Data Source: Aon's 2019 Global Risk Management Survey

Cyber Security: Where Are You in Your Digital Journey?

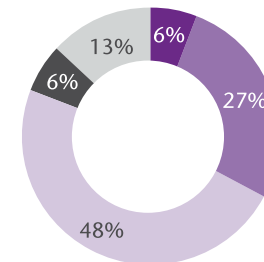
Cyber Insurance Purchasing Patterns

- Insurance Currently Purchased
- Plan to Purchase (Next 12 Months)
- Not Purchased and No Plans to Purchase



Cyber Risk Assessment Activity

- Yes, Quantitative
- Yes, Qualitative
- Yes, Quantitative & Qualitative
- Not Sure
- No



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