

# Menu of Products & Services

COPIC Financial Service Group has the experience to help navigate complex decisions and find a solution. We work with physicians, dentists, and other members of the health care community to help make sure they are adequately insured to manage their professional careers and personal lives. We are an independent insurance brokerage and consulting firm that focuses on the health care industry and offer a wide variety of products and services. Review the list below and call COPIC FSG to learn more:

## PROPERTY & CASUALTY

- ▷ Business Owner's Insurance (Property/General Liability)
- ▷ Cyber Liability/Data Breach Insurance
- ▷ Errors and Omissions (E&O)
- ▷ Directors and Officers (D&O)
- ▷ Liability Insurance
- ▷ Umbrella (Supplement to General Liability)
- ▷ Employment Practices
- ▷ Fiduciary Liability
- ▷ Fidelity Bonds (ERISA)

## LIFE INSURANCE

- ▷ Term
- ▷ Variable
- ▷ Whole
- ▷ Universal

## FINANCIAL & RETIREMENT PLANNING

- ▷ Debt Consolidation
- ▷ Practice Continuation Planning
- ▷ Simplified Employee Pensions (SEP)
- ▷ 401(k)
- ▷ Simple IRAs
- ▷ Traditional and Roth IRAs
- ▷ 529 College Savings
- ▷ Retirement Consulting

## EMPLOYEE BENEFITS

- ▷ Group Health Plans
- ▷ Group Dental Plans
- ▷ Group Vision
- ▷ Group Disability
- ▷ Group Life

## WORKERS' COMPENSATION

## DISABILITY INSURANCE

- ▷ Disability Income
- ▷ Disability Overhead Expense
- ▷ Disability-Retirement Security

## ADDITIONAL SERVICES

- ▷ Professional Employer Organization (PEO) Options
- HR Trainings and Tools
- Wellness Programs
- Compensation Structure
- Payroll Services
- ▷ ACA/ERISA Compliance

### THINK OF COPIC FSG FOR ALL YOUR BUSINESS AND PERSONAL NEEDS

- ▷ Income Protection
- ▷ Loan Collateral
- ▷ Business Protection
- ▷ Data Protection
- ▷ Tax Incentives/Breaks
- ▷ Employer Retention and Recruiting Tools
- ▷ Job Satisfaction
- ▷ Practice Transition
- ▷ Key-man Life Insurance
- ▷ Buy-Sell Agreements
- ▷ Employee Benefit Compliance

 **COPIC**<sup>®</sup>  
Better Medicine • Better Lives  
*COPIC Financial  
Service Group, Ltd.*

7351 E. Lowry Blvd., Ste. 400  
Denver, Colorado 80230  
720.858.6280 • [www.copicfsg.com](http://www.copicfsg.com)

Scan to learn more  
about COPIC FSG.

