



Better Medicine • Better Lives

**COPIC Financial  
Service Group, Ltd.**

# COPIC FSG CLIENT QUESTIONNAIRE

We are committed to ensuring our clients are appropriately protected throughout their careers and their lifetime. To do this, we begin the planning process by asking questions to better understand your overall objectives and goals. This includes learning about your current business coverages, general business demographics, and information that is unique to your personal situation. Please complete the information requested below; it allows us to better understand your needs and provide appropriate recommendations.

Information provided by: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

How did you hear about COPIC FSG? \_\_\_\_\_

What is your timetable to implement COPIC FSG's service offering? \_\_\_\_\_

Business Name: \_\_\_\_\_

Nature of Business: \_\_\_\_\_

Date Established: \_\_\_\_\_

Address(es): \_\_\_\_\_

Business Website: \_\_\_\_\_

Number of Employees: \_\_\_\_\_

Are you currently offering employee benefits?  Health  Dental  Vision  Other: \_\_\_\_\_

Are you currently offering a retirement plan?  SIMPLE  SEP  401(k)  Other: \_\_\_\_\_

Do you have individual disability insurance and life insurance coverage? \_\_\_\_\_

Currently, are your needs more for the business or yourself? \_\_\_\_\_

Which of the following items are most important to you?

### 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

### EMPLOYEE BENEFITS

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

### DISABILITY INSURANCE

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

### FINANCIAL & RETIREMENT PLANNING

- Debt Consolidation
- Practice Continuation Planning
- Retirement Plans
- 529 College Savings
- Retirement Consulting

### WORKERS' COMPENSATION

Is there any additional information/requests we should know about:

\_\_\_\_\_

**Please return this form to [fsginfo@copic.com](mailto:fsginfo@copic.com).**

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