



► **COPIC Financial Service Group**

YOUR PARTNER FOR SUCCESS

An independent insurance
brokerage and consulting firm
that focuses on the health care
industry offering various products
and services.



Better Medicine • Better Lives

***COPIC Financial
Service Group, Ltd.***

www.copicfsg.com

WHY COPIC FSG?

We're here for you at each stage of your career.

At COPIC Financial Service Group (COPIC FSG), we are committed to ensuring that physicians, dentists, and other health care community members are appropriately protected throughout their careers and their lifetime. Your needs will change from your first day to your last, and we can help you prepare for each stage.

Whether you need services for your group or have individual needs, our team can put all the pieces together for you, simplifying the process from the beginning. Our team is comprised of the professionals you need for your business and personal needs all under one roof, so we can work side-by-side for your benefit.

As an independent insurance brokerage and consulting firm, COPIC FSG works with all the top carriers and partner companies to provide the best products and services based on your individual and group circumstances.

Over 35 Years of Customer Care

COPIC Financial Service Group started doing business in 1985 and has grown over the years to build a strong, reliable, and knowledgeable team, expand its scope of services, and establish itself as a trusted partner known for its commitment to customers. We research on your behalf and guide you to save you valuable time and money. As part of the COPIC family of companies, we share the same high values and ethical standards, lead with integrity, and have a strong customer support system in place.

EXPERIENCED PROFESSIONALS

Our strength rests on our people, and each team member draws upon years of experience. With attention to detail and a focus on customer care, we take the time to understand your specific needs and address your concerns.

Collaborations

COPIC Financial Service Group is a proud partner of the Colorado Medical Society (CMS). We collaborate with the CMS staff and other societies within the medical community to gain a better understanding of the community's needs.

In addition, COPIC FSG collaborates with Metro Denver Dental Society and other dental societies throughout the state to service the business and individual needs of the dental community.

These organizations recognize our specialized knowledge and ability to serve their members. Our COPIC FSG account representatives work to negotiate group discounts for society members when possible.

Your Business and Personal Needs

- ▶ Income Protection
- ▶ Loan Collateral
- ▶ Business protection
- ▶ Data protection
- ▶ Tax incentives/tax breaks
- ▶ Employer retention and recruitment tools
- ▶ Job satisfaction
- ▶ Retirement planning
- ▶ Financial planning
- ▶ Personal life insurance
- ▶ Practice Transition
- ▶ Key-man life insurance
- ▶ Buy-sell agreements
- ▶ Employee benefit compliance
- ▶ Human resources services
- ▶ Payroll services
- ▶ Professional Employment Organization (PEO) Options

See our Menu of Products and Services on the back page.

Leading with Integrity

Medical and dental professionals have unique financial challenges, such as protection of their income if they become disabled, cyber liability and succession planning for their practice, and business and family insurance coverage, all of which require specific knowledge and experience. Working with COPIC FSG assures you will receive:



A “**big picture**” approach—we’ll look at your situation from every angle to determine products and services to ensure appropriate coverage.



A comprehensive plan to prepare you for **long-term growth and stability**, outlining the milestones in your life as we help you prepare for the future.



Objective advice and recommendations based on **research and performance** because COPIC FSG is not directly tied to any insurance or investment company. Our allegiance is to you, not the individual carriers.



A **lifelong relationship** built on trust, stability, and experience, so that we can get to know you and take care of you as your needs change over the years.

COPIC Financial Service Group, Ltd., is an insurance brokerage firm representing a variety of insurance carriers. Products offered by COPIC Financial Service Group are not issued by COPIC Insurance Company.

Jeff Feakes offers securities and investment advisory services through Osaic Wealth, Inc. member FINRA/SIPC. Osaic Wealth is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic Wealth.

Brad Radochonski offers securities through The Leaders Group, Inc. Member FINRA/SIPC, 26 W Dry Creek Circle, Suite 800, Littleton, CO 80120. COPIC Financial Services Group is not affiliated with The Leaders Group, Inc.

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 Owners 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)

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

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

ADDITIONAL SERVICES

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



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about COPIC FSG.

