

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 about all the ways we can help simplify your life:

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)
- ▷ Homeowners
- ▷ Automobile

HEALTH, DENTAL & LIFE

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

WORKERS' COMPENSATION

EMPLOYEE BENEFIT COMPLIANCE

- ▷ ACA/ERISA Compliance

PROFESSIONAL EMPLOYER ORGANIZATION (PEO) OPTIONS

DISABILITY INSURANCE

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

LIFE INSURANCE

- ▷ Term Life Insurance
- ▷ Variable Life Insurance
- ▷ Whole Life Insurance
- ▷ Universal Life Insurance

INVESTMENT & RETIREMENT PLANNING

- ▷ Qualified Retirement Plans
- ▷ Simplified Employee Pension Plans (SEPs)
- ▷ 401(k) Plans
- ▷ Traditional and Roth IRAs
- ▷ 529 College Savings
- ▷ Practice Continuation Planning

HUMAN RESOURCES (HR) SERVICES

- ▷ HR Trainings and Tools
- ▷ Wellness Programs
- ▷ Compensation Structure

PAYROLL SERVICES



Better Medicine • Better Lives

**COPIC Financial
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