

COPIC FINANCIAL SERVICE GROUP MENU OF PRODUCTS AND SERVICES

COPIC Financial Service Group works 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 exclusively on the health care industry and offer a wide variety of products and services. Review the list below and check the box(es) of the products/services that you would like to learn more about:

X	PROPERTY AND CASUALTY
	Business Owner's Insurance (Property/General Liability)
	Cyber Liability/Data Breach Insurance
	Errors and Omissions (E&O)
	Directors and Officers Liability Insurance (D&O)
	Umbrella (Supplement to General Liability)
	Employment Practices
	Fiduciary Liability
	Fidelity Bonds (ERISA)
	Homeowners
	Automobile
	WORKERS' COMPENSATION
	HEALTH AND DENTAL
	Group Health Plans
	Group Dental Plans
	Group Vision
	Group Disability
	Group Life
	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 AND 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

Name: _____ I prefer to be contacted via:
 Organization: _____ Phone Email
 Please contact me at: _____ The best time to reach me: _____ am/pm

Please return this form via fax at (720) 858-6281, email to jhood@copic.com, or mail (fold and return using address postage on reverse.)

06/20

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

Securities and Investment Advisory Services offered through Woodbury Financial Services, Inc., Member FINRA, SIPC and Registered Investment Adviser. COPIC Financial Service Group and Woodbury Financial Services, Inc. are not affiliated entities.



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