



Copic Financial

Your Partner for Success

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

Menu of Products and Services

Copic Financial has the experience to help you navigate complex decisions and find a solution. We work with physicians, dentists, and other members of the healthcare 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 offers a wide variety of products and services. Call us to see how we can help you put all the pieces together.

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)

Workers' Compensation

Employee Benefits

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

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

Disability Insurance

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

Life Insurance

- Term
- Variable
- Whole
- Universal

Additional Services

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

Think of Us
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



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