

EVERYTHING WE OFFER

**Treloar
&Heisel**

FINANCIAL SERVICES FOR THE
DENTAL AND MEDICAL PROFESSIONAL

Disability Income Insurance
Business Overhead Insurance
Business Loan Protection
Insurance
Disability Buy/Sell Insurance
Term Life Insurance
Life Insurance for Practice
Loans
Life Insurance for Buy/Sell
Agreements
Permanent Life Insurance
Long Term Care Insurance

**Treloar
&Heisel**

PROPERTY
AND CASUALTY

Professional Liability/
Malpractice Insurance
Entity Coverage
Business Owners Protection
Workers Compensation
Employment Practices Liability
Insurance
Data Breach
ERISA Bonds
Home & Auto Insurance

**Treloar
&Heisel**

WEALTH
MANAGEMENT

Investment Accounts
Individual Retirement Accounts
Retirement Plans
Financial Plans



Services extended through our referral partners

Accounting

Business Consulting

Practice Valuation

Buy/Sell Agreements

Human Resources

Lending

Legal Document Development or Review

Ask for a referral in this area

Investment Advice offered through WCG Wealth Advisors, LLC a Registered Investment Advisor doing business as Treloar & Heisel Wealth Management.

Treloar & Heisel Wealth Management is a separate entity from The Wealth Consulting Group and WCG Wealth Advisors, LLC. Insurance products offered separately through Treloar & Heisel and Treloar & Heisel Property & Casualty.

WCG Wealth Advisors, LLC and Treloar & Heisel Wealth Management do not offer tax advice.

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