

HELPING TO PROTECT PHYSIATRISTS

Treloar & Heisel, an EPIC company, is a financial services provider to medical and dental professionals across the country. Since 1959, Treloar & Heisel has assisted thousands of clients throughout every step of their careers - from residency through retirement.

We are proud to have partnered with The American Academy of Physical Medicine & Rehabilitation since 2001.



EVERYTHING WE DO

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- Term Life
- Permanent Life
- Long Term Care
- Home & Auto
- Valuable Collections/Jewelry
- Boat & Travel
- Umbrella Policies

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- Business Loan Protection
- Business Overhead Expense
- Business Owner's Protection
- Worker's Compensation
- EPL, Data Breach, ERISA Bonds
- Term Life for Practice loans
- Disability and Life Buy/Sell
- Entity Coverage

WEALTH MANAGEMENT

- Financial Planning
- Student Debt Management
- Portfolio Design
- Investment Accounts
- IRA & Roth IRA
- Retirement Plan

Reach out to **Treloar & Heisel** today!

800-345-6040

info@treloaronline.com



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.

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