Pensionmark RETIREMENT GROUP

Wealth Management

Guiding you through the world of benefits management, wealth management, and risk management

PENSIONMARK OVERVIEW

PENSIONMARK's BENEFITS is a full-service advisory group that guides business owners and individual clients through the complicated world of wealth management, benefits management, and risk management.

OUR EXPERIENCE

PENSIONMARK's Wealth Management Team specializes in affordable, independent and personalized financial services for all of your retirement plan and investment needs.

OUR APPROACH

Our advisors have built a reputation as industry leaders that engage clients using simple language and easily understood examples to develop sensible investment strategies that are comprehensive and unique to your goals, and take into account tax-smart strategies. PENSIONMARK is an independent team of advisors, meaning our clients receive an objective perspective on their situation that is based on the client's best interest.

OUR DIFFERENCE

PENSIONMARK offers cutting-edge 401(k) plans that typically carry lower administration fees, minimize fiduciary responsibility, increase participation, and are easier-to-manage.

Our ultimate goal is to reduce your risk as a fiduciary, and guide your employees towards a successful retirement. Our standards are guided by the Pension Protection Act and ERISA—we strive to go above and beyond those requirements.

By utilizing this approach effectively, the requirements for a fiduciary fall into place naturally—this is called The Prudent Man Rule of ERISA; Our motto and business model are built around this rule.

Pensionmark Wealth Management Expertise

RETIREMENT PLANS

- 401(k) Plans
- 403(b) Plans & Tax Sheltered Annuities
- Individual Retirement Accounts (IRA), Traditional & Roth
- Pension & Profit-Sharing
- Savings Incentive Match Plan for Employees (SIMPLE)
- Simplified Employee Pension Plans (SEP)
- Individual & Group Education Provided

FINANCIAL PLANNING

- Executive & Employee Financial Planning
- Individual Financial Planning
- Estate Planning
- Educational Seminars

EXECUTIVE BENEFIT FUNDING

- Bonus Plans
- Deferred Compensation Plans
- Employee Stock Ownership Plans (ESOP)
- Group Carve Outs
- Split Dollar Plans
- Supplemental Executive Retirement Plans

INVESTMENTS

- Annuities & Income Planning
- Brokerage Accounts (Traditional & Fee-Based)
- Managed Accounts (Fee-Based)
- Retirement Accounts (Traditional & Roth IRA)
- Educational Accounts (529 Plan & Coverdell Education Saving)
- Equity Investments (Mutual Fund & Publicly Traded Stock)
- Fixed-Income Investments (Mutual Fund, Bond, Money Market)
- Socially Responsible Investments

BUSINESS CONTINUATION FUNDING

- Buy / Sell Agreements
- Business Overhead Expense Coverage
- Disability Buyout Plans
- Key Person Coverage
- Succession Planning

INSURANCE PLANNING

- Life Insurance
- Disability Insurance
- Long-Term Care Insurance

Securities offered through LPL Financial • Member FINRA & SIPC • Advisory services offered through Pensionmark Retirement Group, a Registered Investment Advisor Wisconsin Insurance License #2366478

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