


Retirement Plan
Education Consultants



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Plan Provider

Wilmar(k) Associates is an essential service and a valuable resource for Plan Providers. With a significant portion of today's mid to large size plans requiring open architecture, Wilmar(k)'s third party approach to retirement education helps deliver a consistent and effect message to plan participants.

Having worked extensively with leading plan providers, Wilmar(k) recognizes that the educational needs for plan sponsors can exceed the demands that plan providers have allocated, in both time and qualified individuals, to perform education meetings. Wilmar(k) Associates fulfills that need leaving your personnel free to do what they were hired to do. Our combined experience of 26 years with top plan providers in the Defined Benefit and Defined Contribution marketplace translates to a distinct and competitive advantage for you. In addition, our participation in the sales process aids both the provider and the advisor and can make a distinct difference in a plan won or a plan lost.

The Wilmark(k) Advantage:

- An educational provider which delivers a consistent message of service for your plans.
- Increased participation and deferral percentages.
- Proper Diversification of Investments
- Competitive and Flexible pricing structure
- Partnering with provider, sponsors, advisors in developing an ongoing education and communication strategy to maximize the benefits of their retirement plan .
- Prepare participants for a successful retirement.

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Our Mission



Successful organizations know that it takes more than a good plan to succeed in business. It takes an empowered organization, focused on realistic goals, with impassioned leadership. It takes vision. It takes consensus. It takes a sense of purpose. Wilmar(k) Associates, LLC was founded on these essential principles, along with a determination to put our clients interests first and foremost.

- A strong 'Goal' of improving education in the retirement plan marketplace.
- A realistic 'Mission' of partnering with top plan providers, sponsors, consultants and advisors.
- A 'Vision' of establishing 3rd party, non-biased education as a requirement for all retirement plans.

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