



Wisconsin
Benefit
Planning

Your Health, Life & Retirement Specialists

Wisconsin Benefit Planning, Inc.

Your Health, Life & Retirement Specialists
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More 401k Options, Lower 401k Expenses

Rob was born in Wausau, WI and has lived there all his life. He graduated with a degree in Mathematics from Wartburg College in Waverly, IA. Mathematics experience and his love in working with people propelled him into the business retirement plan industry where he uses both people skills and math skills often. Rob has his series 7 and 63 securities licenses for the state of Wisconsin. Rob is the director of Wisconsin Benefit Planning's business retirement planning department. Rob and Charlie work closely together to provide more options and lower expenses in retirement plans throughout North Central Wisconsin. Rob will help the business owner with fiduciary liability issues, plan costs, investment option performance and many 401k strategies. Rob and Charlie will also service the plan participants on site and provide employee education. Rob is a registered rep with Packerland Brokerage Services 432 Security BLVD Green Bay, WI 54313 Member SIPC & FINRA.

Rob offers services in the following areas:

- Independent 401K advisor services (enrollments, cost reduction strategies, etc)
- SIMPLE, SEP IRAs
- Fiduciary programs for plan sponsors
- 401k profit sharing strategy implementation
- Retirement plan cost analysis
- 401k retirement income solutions

Rob offers the following benefits to his clients:

- The development of a solid long term relationship with a Business Retirement Plan Specialist.
- Increased knowledge and effective handling of 401k plan strategies
- An independent 401k advisor/resource to help fit a plan for your business
- 401k cost analysis
- Many valuable relationships with a variety of plan providers and third party administrators