



William (Will) Orr

William Orr provides superior retirement consulting services by helping his clients understand their retirement plan, mitigate unintended risks, and provide clarity with regard to plan fees and expenses.

For more than 20 years, Will has been helping clients with their retirement plan needs. Prior to founding Compass Corporate Retirement Solutions, he worked for leading mutual fund and retirement plan providers, such as Fidelity Investments, Morgan Stanley and Daily Access Concepts. Additionally, he is regularly requested to share his knowledge and insight of plan management and fiduciary liability at a number of national forums.

Business Management Services

- Vendor Relationship Management
- Plan Expense Transparency
- Employee Communication

Will believes his relationship management experience is the catalyst for establishing strong long-term partnerships with his clients. Clients trust his objective advice and recommendations as they work together to select partners to successfully accomplish the client's goals.

As a plan sponsor and fiduciary, it is critical to be at the helm of plan fees. Clients can expect Will to help them understand the costs of their retirement plan and determine any necessary adjustments to bring greater cost efficiency.

Communication is key to enabling employees to maintain their current lifestyle in retirement and retire on their own terms. Will's experience with plan communication is a proven tool that will help present and promote each client's retirement goals. He utilizes a variety of web based and mobile technologies, in addition to traditional group enrollments, to engage and educate employees and help them begin their track to a successful retirement.

Education, Registrations, and Specialized Training

- * B.S., Finance, Xavier University
- * FINRA Series 6, 7, 63, 65 Registrations
- * Accredited Investment Fiduciary® (AIF®)

Will and his wife, Heather, have been married for over 20 years and are busy raising Abby, Carly, Christopher and Claire.