



## Waldman Bros

### Area of Expertise: Employee Benefits & Risk Management

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### Company Overview:

Founded in 1939 in Dallas, IMA|Waldman is a unique “integrity-first” organization that forges long-term partnerships with each client to help protect their financial and insurance interests. From comprehensive commercial and personal insurance to financial services and employee benefits, the firm’s proven expertise places client needs first through strategic counsel and education to ensure sustained value and performance.

Our depth of knowledge in our core service areas is unmatched and the great majority of our clients end up working with us in two or more of those service areas. To make the client experience seamless, each client has an advocate who will serve as that client’s liaison to each of our business units.

### Year Founded:

1939

### Core Services:

- Personal Insurance
- Commercial Insurance
- Employee Benefits
- Financial Services

### What Makes Us Different:

- IMA|Waldman invests time and resources into our clients in an effort to understand their unique goals and offer personalized solutions that help ensure they are properly protected
- We are committed to delivering service that protects the interests and needs of our clients so we remain long-term partners
- We have many multi-generational clients, whole families who have trusted us to protect their growing and changing families and businesses for decades



For more information about this Core24 approved provider, contact Sunny Nunan at [sunnyn@core24.com](mailto:sunnyn@core24.com) or 972-498-1755