



Tom Chisholm

Managing Director



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Managing Director Tom Chisholm consults on a wide range of executive benefits issues, including nonqualified benefit programs, employee retention, senior management compensation, change in control issues, and plan integration during mergers and acquisitions. Widely published, Tom is often quoted by the media on the topic of nonqualified benefits.

- Frequent lecturer addressing a range of topics related to executive benefits
- Former Lead Consultant and Senior Managing Director at Clark Consulting, where he assisted new and existing clients in the design, funding, implementation, and administration of nonqualified benefit plans
- Former consulting and management for Unilever and Pfizer, Inc. Recruited to Clark to oversee East Coast and Southeast consultants
- Extensive experience consulting in areas of high technology, manufacturing, utilities, and retail
- Endurance athlete, member of [Team USA](#), [Long Course Triathlon Team](#) 2015 and 2012
- Active fundraiser and supporter of [World Bicycle Relief](#)

Degrees, Certifications, and Registrations

- Series [6](#), Series [63](#), and Series [65](#) registered
- DePaul University, Master of Business Administration with Distinction
- Western Michigan University, Bachelor of Business Administration, Marketing

Publications and Presentations

- [Fulcrum Partners Honors its Executive Benefits Advisory Team in Chicago](#) (June 27, 2017)

The Exchange for People Strategy (August 2014)

- ["Retail Executive Retirement Planning: Finance Golden Years"](#)

The Exchange for People Strategy (July 2014)

- ["Performance-Based SERPs: Changing the Landscape"](#)

WorkSpan (June 2005)

- "Funding Post-Retirement Medical Benefits"

Expertise

- Helping corporations to find creative solutions to design and finance their Executive Benefit Plans

View on the Fulcrum Partners website: <https://www.fulcrumpartnersllc.com/team/tom-chisholm/>

Tom Chisholm is affiliated with Valmark Securities, Inc. Securities offered through Valmark Securities, Inc. Member FINRA/SIPC. Investment Advisory Services offered through Valmark Advisers, Inc. a SEC Registered Investment Advisor. 130 Springside Dr., Akron Oh 44333. 800-765-5201. Fulcrum Partners LLC is a separate entity from Valmark Securities, Inc. and Valmark Advisers, Inc.

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