



# Bruce Brownell

## Managing Director & Partner



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A 30+ year veteran in financial consulting, Bruce Brownell is a founder of Fulcrum Partners, LLC. With the goal of building a wholly independent, executive benefits consultancy recognized for great assets, technical astuteness, and creative solutions, Bruce has been at the core of driving Fulcrum Partners to a position of industry excellence. From his years in the U.S. Navy to his extensive experience in executive benefits, Bruce brings skills built on a foundation of leadership, vision, and strategic thinking.

*"In order to retain key people, organizations need to reward them in meaningful and substantial ways, leveraging the retirement concerns of workers. Retirement security should be a part of long-term value creation. Fulcrum Partners helps guide organizations in making the decisions that are best for the employees, the company itself, and its shareholders." –Bruce Brownell*

With more than 20 years exclusively in executive benefits, Bruce has consulted in many for-profit industries, including engineering, manufacturing, distribution, health care, and technology. As a specialist in IRC Section 409A, Bruce's experience covers the full range of executive benefit plans, including the integration of equity-based plans, tax deferred executive compensation arrangements, supplemental retirement strategies, and other executive benefit and performance based plans.

Bruce was a pioneer in developing Fulcrum's Executive Benefits Benchmarking practice, a unique deliverable in the benefits marketplace.

## Experience and Service

- Former Senior Vice President at Clark Consulting, Inc.
- Former Senior Vice President at Cigna Financial Advisors, Estate Planning, and Business Succession Planning
- United States Navy, Surface Warfare 1980-1987
- [Jacksonville Historic Naval Ship Association](#), Board Member

## Degrees, Certifications, and Registrations

- CERTIFIED FINANCIAL PLANNER™ Series [6](#), [63](#), [65](#), [7](#)

- Financial Planning Association, Member
- Association for Advanced Life Underwriters, Member
- Kenyon College, Artium Baccalaurei

## Publications and Presentations

- [Fulcrum Partners Makes Donations to Two Jacksonville-Based Nonprofit Organizations](#)
- [Rethinking Executive Compensation While Awaiting Section 162\(m\) Guidance](#)
- [A Unique Business Partnership Yields an Innovative Executive Benefits Advisory](#)
- [Fulcrum Partners and the Valmark Global Gift Fund Match Donations in Support of Daniel Kids](#)

*The Exchange for People Strategy* (June 2014)

- ["If They Won't Eat What You're Feeding Them..."](#)

*The Exchange for People Strategy* (May 2014)

- ["Could the Boom Take You Into a Career in Executive Benefits Consulting?"](#)

*The Exchange for People Strategy* (March 2014)

- ["The Gaping Hole in Your Benchmarking Strategy: Interview with Bruce Brownell"](#)

## Expertise

- With an in-depth understanding of analysis, design, integration, administration, and communication of executive compensation and benefit strategies, Bruce helps companies attract and retain key talent by integrating benefits into total rewards

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

*Bruce Brownell is affiliated with Lion Street Financial, LLC. (LSF). Securities offered through Lion Street Financial, LLC., (LSF) member [FINRA](#) & [SIPC](#). Investment Advisory Services offered through CapAcuity, LLC and Lion Street Advisors, LLC., Registered Investment Advisors. Fulcrum Partners, BDO Alliance USA, LSF & CapAcuity, LLC. are non-affiliated entities.*

Check the background of this investment professional on [FINRA's BrokerCheck](#)

