



David H. Fisher

Senior Vice President – Retirement



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David Fisher is a Managing Partner focusing on executive benefit plans for public and large private companies nationally. Prior to joining Fulcrum Partners as a Partner and Managing Director in 2011, David was a Senior Vice President with Clark Consulting, a national executive benefits consulting firm established in 1967.

Representative matters in which David has been involved include advising clients on the design, implementation, communication, funding, and administration of various nonqualified plans, including deferred compensation plans, supplemental executive retirement plans, and phantom stock plans. As a part of this process, David has developed creative strategies for aligning the strengths of Fulcrum Partners' combined 200+ years of intellectual capital with their synergistic vendors in these areas, ensuring that the resulting programs maximize the executive benefits industry's best practices. He has also been successful in introducing Fulcrum Partner's various strategic partners for other advanced human resources needs.

David has been interviewed and has provided articles with *WorkSpan Magazine*, *Columbus Business First*, *Columbus CEO*, Bricker & Eckler's *Acredula* publication and *The Exchange*, a Grayhall publication on executive benefit programs and life insurance matters.

David and his wife are very involved in The Salvation Army, Arise Rwanda Ministries and The Boys and Girls Club of Bluffton. They are avid outdoorsmen and have hiked Kilimanjaro, the Grand Canyon, and the Inca Trail to Machu Picchu. David's next climb scheduled is Mount Rainier followed by Aconcaqua in Argentina.

Degrees, Certifications, and Registrations

- Series 6 and 65 registered
- College for Financial Planning in Denver, Colorado, CERTIFIED FINANCIAL PLANNER™, CFP designation
- The Ohio State University, Bachelor of Science, Finance
- Member AALU

Publications and Presentations

Columbus Business First Magazine

- "Survey Reveals Prevalence, Popularity of Nonqualified Deferred Compensation Plans High"
- "Executive Pay Trends"
- "The Codification of Corporate Owned Life Insurance"

Retail Merchandiser Magazine

- "The Hidden Face of Reverse Discrimination in Qualified Plans and How the Retail Sector Can Reduce Exposure"

Acredula (a publication by the Bricker & Eckler Law Firm)

- "Why Boards Need a 'Holy Cow!' Calculation"

Expertise

- Objective analysis of both the needs of clients and the options in integrated solutions
- Capability to connect with clients on a personal level, earn their trust, and approach each situation with compassion
- Creative problem solving with both long and short term goals in mind

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

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