



Kristine Kopsiaftis Lampert

Managing Director



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Managing Director Kristine Kopsiaftis consults with public and private entities to provide a full range of services with respect to the design and management of the suite of executive benefits programs, including deferred compensation, after tax plans, and executive life and disability programs. Inspired by her knowledge, diligence, and her skill in hearing both what clients say and fail to say, organizations engage Kristine to provide creative, performance-driven strategies for attracting, retaining, and rewarding highly compensated executives.

Kristine brings a personal perspective to life insurance and financial planning after pausing her own professional education and career to take on full responsibility for her family's restaurant business when her father became seriously ill. She says, *"I saw firsthand how wealth planning helped my family when my father died. I realized how much I might be able to help others through the strategic use of insurance products and thoughtful business planning."*

Kristine has in-depth experience in all areas of Corporate Owned Life Insurance programs that include insurance chassis design, investment options, and regulatory and compliance issues. Her extensive nonqualified consulting expertise includes benefit plan design, asset management, and funding administration and security. Kristine has also begun working with companies to provide greater support on the day-to-day management of employee benefit plans and to find ways to save companies money by containing costs without sacrificing benefits. In every capacity, Kristine serves her clients with experience and the utmost attention to detail.

- Member [Women in Executive Leadership](#)
- Member South Florida Benefits & Compensation Association
- Past Regional Director at MetLife, Specialized Benefit Resources
- Former Executive Benefits Consultant, Phoenix Life

Degrees, Certifications, and Registrations

- Series [6](#), [63](#), and [65](#) registered
- [Accredited Investment Fiduciary](#) (AIF)
- [Bentley University](#), [Master of Science in Taxation](#)
- [Bentley University](#), Bachelor of Science in Accountancy

Publications and Presentations

- [Fulcrum Partners Sponsors TRASF Total Rewards Conference](#) (September 26, 2018)
- [Kristine Kopsiaftis Lampert, Helping Fulcrum Partners Reach \\$6B in Assets Under Management](#) (August 30, 2017)

Expertise

- Best practices in plan design, asset management, plan financing efficiencies and value generation
- Education and communication
- An advocate for clients in vendor relationships
- Fluid integration across the administrative platform

View on the Fulcrum Partners website: <https://www.fulcrumpartnersllc.com/team/kristine-kopsiaftis-lampert/>

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