



Phillip L. Currie Jr.

Managing Director



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For over 25 years, Managing Director Phillip L. Currie, Jr. has consulted in the employee and executive benefits field where he is recognized as an industry leader. His expertise includes designing executive benefit programs that align plan design features with corporate objectives and the implementation of various employee benefit cost take out strategies.

Dedicated to the client relationship, Phil says, "I must listen first, not assuming I know your objectives, before I am able to make my recommendations."

Phil currently oversees the management of numerous employee and executive benefit programs for his Fortune 1000 clients, which are long-term client relationships that are built on trust and confidence in Phil's experience and integrity.

- More than 15 years of experience as a top executive benefits producer for one of the nation's leading service providers; recognized as a leader of various employee benefit cost take out strategies
- Began his career in the employee benefits division of Sedgwick James, which later merged with Marsh. At Sedgwick James, he developed the national "Standards of Practice" for the firm's Executive Benefits Group
- City of Glendora Investment Advisory Committee
- Board of the Glendora Unified School District Endowment
- Junior Achievement Volunteer for Glendora, California

Degrees, Certifications, and Registrations

- Series 7 and 63 registered
- Insurance licensed since 1989
- University of Southern California, Bachelor of Science in Business Administration

Publications and Presentations

- Fulcrum Partners Los Angeles Expands with New Offices in Newport Beach (March 23, 2017)

The Exchange for People Strategy (October 2014)

- "A New Look at Executive Retirement Plans: Maximizing Utility of Executive Retirement Plans"
- Main Presenter, *Utah Association of CPAs Winter Conference* (December 2011)

Financial Executive Magazine (December 2008)

- "A New Look at Executive Retirement Plans"

Expertise

- Attentive listener with the capability to understand the needs of each client
- Excellent "Critical Path" thinker with the ability to synthesize human resources, finance, and legal components
- Strong understanding of how benefit plans align with corporate objectives and then deliver results

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

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