



Scott Cahill

Managing Director



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Scott Cahill is a Managing Director of Fulcrum Partners Orlando and is one of the founders of Fulcrum Partners LLC. Over his more than 30-year career, he has specialized in the efficient design and funding of executive benefits for corporations and estate tax liabilities for wealthy families.

His expertise includes strategic integration of compensation and benefits for the top talent at client companies. The result is a comprehensive and effective total rewards structure. He also consults with medium to large private organizations on business succession and ownership transition challenges.

Scott is routinely engaged by organizations to design

- IRS Section 409(A) Plans
- Executive Life & Disability Income Programs that can reduce the risk components of Core Employer Group Plans and restore benefits lost to IRS or insurance carrier limitations
- Estate Tax Efficient Succession and Generational Planning Strategies
- Tax Efficient Hedging of Non-Qualified Plan Liabilities

Scott serves on the Advisory Board of the National Christian Foundation (Orlando) as he looks to see the city where he grew up and has now raised his own children become a generous, giving community. Scott and his family have been active participants and financial sponsors of the Luis Palau Association outreach to sponsor evangelical initiatives to encourage and equip cities around the globe.

Experience and Service

- Past Owner and Principal of James B. Greene & Associates, Inc. where he developed an extensive list of high profile clients throughout the southeast
- Central Florida Estate Planning Council, Member
- The Luis Palau Association, Chairman of the Board
- The National Christian Foundation/Orlando, Advisory Board Member
- Top of the Table, Member

Degrees, Certifications, and Registrations

- Association of Advanced Life Underwriting, Member
- University of South Florida, Bachelor of Science in Finance

Publications and Presentations

Attended, presented, and spoken to peer professionals in Compensation Consulting, Law, Accounting, and Insurance

- Fulcrum Partners Orlando Honored for Exemplary Executive Benefits Services (October 31, 2017)

Expertise

- Creative efficiency: Scott is always looking for financial solutions to the benefits challenges his clients face, anticipating outcomes, and recommending adjustments
- All aspects of 409A Nonqualified Deferred Compensation Plans

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

Scott Cahill 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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