



Think Everyone Understands C-Suite Executive Benefits? Maybe Not

FULCRUM PARTNERS AUGUST 25, 2017 [DEFERRED COMPENSATION AND EXECUTIVE BENEFITS NEWS](#)

Financial Advisor (FA Online) recently published an article titled, “C-Suite Executives Could Benefit From Financial Counseling.” The article, written by Karen DeMasters, cited a survey of HR professionals on the topic of C-Suite executive benefits.

With nearly 100 human resource professionals involved in the study, the research looked at the participants’ perception of how well (or how poorly) C-Suite executives actually comprehend their benefits. All of the HR industry participants were in attendance at the May 2017 [WorldatWork](#) Total Rewards Conference in Washington, DC.

The surveyed group indicated, by over 50 percent, that they believe the C-Suite executives in their respective companies, do not fully understand their own compensation, benefits, and incentives programs. Additionally, the HR professionals identified that executives were sometimes distracted from the execution of their jobs with their concerns diverting time and attention to their personal financial situation.

“Things have changed,” says Kenny DePaolo, Financial Consultant at Fulcrum Partners. “With the complex ways to accumulate wealth for retirement, I have found an immense number of c-suite executive clients who are unaware of the great benefits that their corporation provides. Just as importantly, they may not know how to utilize specific vehicles for deferred tax purposes as well as for closing the gap for their retirement needs.”

The study, *2017 HR Report: The State of Executive Financial Counseling*, was released August 22, 2017, by AMG National Trust Bank.

Securities offered through Registered Representatives of ValMark Securities, Inc. Member FINRA, SIPC, 130 Springside Drive, Akron, OH 44333-2431, 1-800-765-5201. Investment Advisory Services offered through ValMark Advisers, Inc., which is a SEC Registered Investment Advisor. Fulcrum Partners LLC is a separate entity from ValMark Securities, Inc. and ValMark Advisers, Inc.

Photo credit: Nathan Shipps

| No part of this document may be reprinted without the express written permission of Fulcrum Partners LLC#