



FOR IMMEDIATE RELEASE

## **Fulcrum Partners Adds Tom Cook to Its Newport Beach, CA Office**

PONTE VEDRA BEACH, FL -- (February 20, 2018) For the third consecutive year, the Los Angeles and Newport Beach offices of Fulcrum Partners LLC are entering the new year with announcements of growth and expansion. [Thomas A. Cook, CFA](#) has joined the team as Financial Consultant at the company's Newport Beach office.

Tom, who has nearly a decade of professional experience in the financial industry, is a Chartered Financial Analyst (CFA®) charterholder and holds a Master of Business Administration and a Master of Science, Finance from Indiana University, as well as a Bachelor of Arts in Economics from Davidson College. While attending Davidson, Tom was a starting quarterback for the Division 1 school's football team.

Managing Director at [Fulcrum Partners Los Angeles and Newport Beach](#), Phil Currie

stated, "Tom is a natural fit for our west-coast offices. He shares our team's passion to work hard, play hard and always deliver the highest levels of service and expertise to our clients.

"Our Fulcrum Partners offices in California are on the growth-mode war path. We are seriously reinvesting in the company. At the same time, our holistic approach to business and life means we are also investing in our own wellness and physical fitness, committed to making healthy choices. The result is a vibrant team and a high-energy organization."

Tom's work history includes Portfolio Consultant for Schwab Private Client Investment Advisory and Financial Analyst or Senior Analyst for Bank of America, Florida Municipal Power Agency and others. Most recently, he spent nearly ten years with a leading provider of retirement plans, insurance and consulting services, in roles ranging from Financial Analyst to Senior Consultant.

"I am focused on bringing my technical expertise and experience to the design, implementation, funding and ongoing administration of nonqualified deferred compensation plans." said Tom. "Fulcrum Partners has launched a groundbreaking concept for client engagement in our industry, and I feel like I am joining a vibrant, forward-thinking team at exactly the right time."

## **Fulcrum Partners LLC:**

Fulcrum Partners LLC ([www.fulcrumpartnersllc.com](http://www.fulcrumpartnersllc.com)) is one of the nation's largest executive benefits consultancies. Fulcrum Partners is a wholly independent, member-owned firm dedicated to helping organizations enhance their Total Rewards Strategy. Founded in 2007, today the company has offices in Atlanta, Georgia; Chicago, Illinois; Charleston, South Carolina; Columbus, Ohio; Delray Beach, Orlando and Ponte Vedra Beach, Florida; Honolulu, Hawaii; Houston, Texas; Los Angeles and Newport Beach, California; Portland, Oregon; and Washington D.C. Fulcrum Partners is an independent member of BDO Alliance USA. Learn more about the Fulcrum Partners executive benefits advisory team at <https://www.fulcrumpartnersllc.com/fulcrum-partners-team/>.

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### **CONTACT:**

Bruce Brownell

904.296.2563

[press@fulcrumpartnersllc.com](mailto:press@fulcrumpartnersllc.com)



**Tom Cook, Fulcrum Partners LLC**