



FOR IMMEDIATE RELEASE

Fulcrum Partners: Delivering Eye-Opening Executive Benefits Data in an Atypical Campaign

PONTE VEDRA BEACH, FL -- (February 13, 2018) Fulcrum Partners executive benefits advisory is shaking up top level executives across the country, delivering eye-opening facts about each executive's benefit and retirement plan. As part of an engagement strategy that is both disruptive and enlightening, many c-suite executives are receiving information packages along with a communication campaign recommending they visit a personalized webpage, their PURL. Each unique personal webpage features the benefit plan data of the target executive compared to

that of other individuals in their peer group. The charts identify people by name and are built on hard numbers, based on the most current information available.

“As soon as executives see their personal benefits charted against their peers’ data,” said [Tom Chisholm](#), Fulcrum Partners Chicago, “they immediately recognize the disparities. They see how the benefits plan that looks so generous now, may not, over time, be the best option for reducing their tax load and maximizing their reward.”

[Andy Hart](#) of Fulcrum Partners Washington D.C., is part of the team that spearheaded and launched this innovative engagement plan. Andy explained, “Our contact list includes some 7,000 top-level executives in publicly owned US companies. We are currently reaching out to people, sending them the link to their personal URL. No one in our profession has ever contacted people in such a bold way, but we wanted a cut-to-the-chase approach.”

Fulcrum Partners has spent more than two years compiling data and building a delivery platform for this trailblazing initiative. “We’ve implemented sophisticated customer relationship management (CRM) technology, paired it with top-notch marketing and engagement tools, rebuilt our website from the ground up and developed, refined and re-refined a massive amount of complex and detailed data,” said [Chris Nyland](#), Managing Director of the company’s offices in Charleston, South Carolina. “The hours and dollars invested in this effort are considerable and all the

team members at Fulcrum Partners have been challenged and excited to expand our technology skills and grow with this process.”

Last year, Fulcrum Partners celebrated its 10-year anniversary, however the partner/members at the company average more than 31 years of executive benefit experience. The company offers securities through [ValMark Securities, Inc.](#) member FINRA, SIPC and Investment Advisory Services through ValMark Advisers, Inc., which is an SEC Registered Investment Advisor. Fulcrum Partners is also an independent member of the BDO Alliance USA.

About Fulcrum Partners LLC:

Fulcrum Partners LLC (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 the 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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Are you certain your executive benefit plan will be what you are expecting it to be?

Two executive compensation packages may appear the same, on the surface, but...

In an uncertain economy and an unpredictable world, knowing exactly where you stand is more important than it has ever been. Only when you are equipped with the right information, can you make the optimal decisions for your company, your family, and your future.

Fulcrum Partners deals in facts and hard numbers. Our executive benefits consultants average 31 years of experience in helping top talent and organizations maximize re-qualified deferred compensation strategies.

At no cost to you or your company, we will provide you a customized chart that shows your personal benefit plan information, the information of others in your peer group, and data that is typically not found in other benchmarking reports.

Why is this so important? Because two executive compensation packages may seem identical, but time inevitably reveals disparities. Executives who think they are earning the most may, in the end, walk away with less than their peers—and less than they are expecting.

No strings attached. Contact us for your Retirement Income Replacement Ratio, with your individual data and that of your peer group.

Name

First Last

Email

Phone

Your information is secure and will be used to contact you about your peer group comparison data.

Two side-by-side bar charts. The left chart is titled "Retirement Income Replacement Ratio" and the right chart is titled "Retirement Income Replacement Ratio - Russell 3000". Both charts show data for various companies, with bars representing different metrics. The charts are used to compare individual executive data against peer group data.

Executive comp.

Will what's beneath the surface be
what you're expecting?



See hard numbers for how your personal compensation
stacks up against your peers.

