



FOR IMMEDIATE RELEASE

**Fulcrum Partners Executive Benefits, Supporting BDO Alliance USA
CPA Firms**

PONTE VEDRA BEACH, FL -- (May 2, 2018) Fulcrum Partners LLC, a nationwide executive benefits advisory, works in alliance with the select CPA member firms of the BDO Alliance USA. From May 7 through 9, Fulcrum Partners will be part of BDO's 25th Anniversary Alliance Conference, to be hosted at the Bellagio, Las Vegas, Nevada. This year's BDO Alliance conference welcomes over 1500 CPA Alliance Members, BRN Alliance Members, BDO USA Leadership and guests from BDO International Member Firms. Attendees will include best in class practitioners in the accounting profession, along with other members and program vendors who

provide business development, marketing training and other valued services to support accounting professionals.

Fulcrum Partners, an independent member of the [BDO Alliance USA](#), is an executive benefit advisory with more than \$6 Billion in assets under management. Serving executives and organizations with executive benefits and deferred compensation solutions, Fulcrum Partners also provides targeted services for CPA firms, including executive benefits and nonqualified deferred compensation consulting, executive disability and life insurance review, insurance policy audit and administration, bank owned life insurance (BOLI), business succession planning, and high net worth and estate planning.

Colleen Mhley, Marketing Director for the BDO Alliance USA, said, "This year's conference will be unique as we commemorate the 25th Anniversary of the BDO Alliance USA. Among the outstanding keynote speakers joining us over the course of three days will be Barry Melancon, Allan Koltin, Tom Hood and other inspiring thought leaders. In fact, seven of the '2017 Top 10 Most Recommended Consultants,' as named by *Inside Public Accounting* magazine, are included in the lineup of speakers, sharing their insights on 'What Makes a Best in Class CPA Firm.'"

Representing Fulcrum Partners at the conference will be Managing Directors: [Bruce Brownell](#), (Ponte Vedra Beach); [G. Scott Cahill](#), (Orlando); [Kristine Kopsiaftis](#) (Delray Beach); and [Monte Harrick](#) (Los Angeles).

"I am looking forward to joining the leaders and Alliance members at the annual BDO meeting in Las Vegas," said Monte Harrick. "This is an opportunity to learn, network, and generate ideas to improve our consulting practice. At the same time we are invigorating our business, we also are building new relationships as CPA firms come to understand more about how our services expand their offerings and help them support their clients."

Fulcrum Partners LLC:

Fulcrum Partners LLC (www.fulcrumpartnersllc.com) is one of the nation's largest executive benefits consultancies. A wholly independent, member-owned firm, Fulcrum Partners is 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. Learn more about the Fulcrum Partners executive benefits advisory team at <https://fulcrumpartnersllc.com/fulcrum-partners-team/>.

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.

ABOUT BDO ALLIANCE USA:

In 1993, BDO USA, LLP launched its Alliance Program with one goal in mind: to provide better geographic coverage to existing BDO clients in locations without a nearby office. Operating from BDO USA's headquarters, the BDO Seidman Alliance – as it was then known – admitted four, independent member firms that first year from Louisiana, South Carolina, Michigan and Indiana.

Twenty-five years later, the BDO Alliance USA has expanded to become one of the largest alliances of its kind, with more than 285 independent members nationwide, including many in the same cities as BDO offices. The BDO Alliance USA offers firms access to technical and practice management resources, industry experience, referral opportunities, and education, along with national stature and international reach. By collaborating with BDO and each other, BDO Alliance USA firms are better

able to grow their capabilities – and their client base. The BDO Alliance USA is a subsidiary of BDO USA, LLP, a Delaware limited liability partnership.

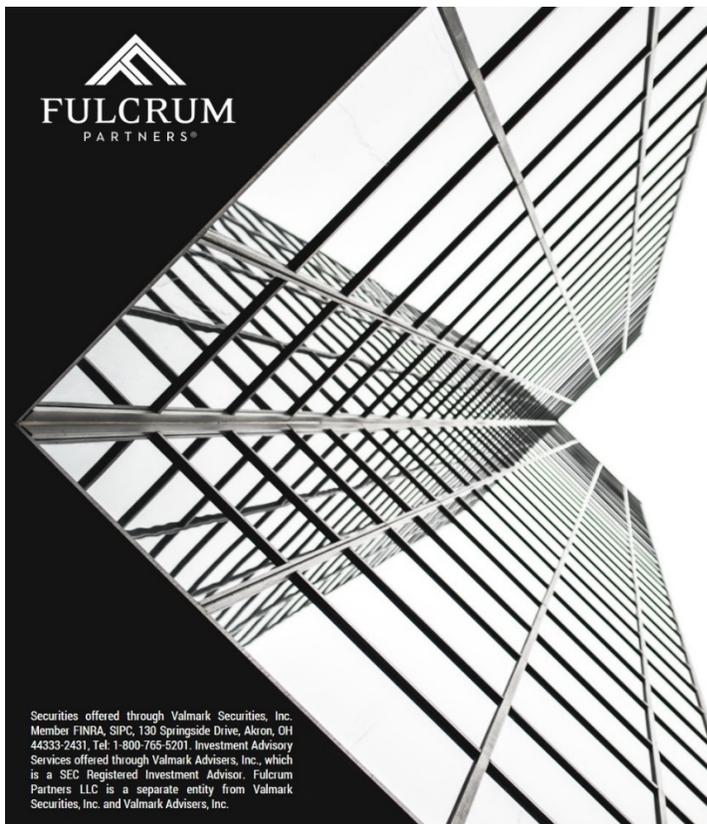
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CONTACT:

Bruce Brownell

904.296.2563

press@fulcrumpartnersllc.com



**Convergence.
Collaboration.
Synergy.**

**Fulcrum Partners
& Your CPA Firm.**

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- ⤴ Nonqualified deferred compensation
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- ⤴ Bank owned life insurance. BOLI.
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