



FOR IMMEDIATE RELEASE

Fulcrum Partners Supports the AALU Annual Meeting

PONTE VEDRA BEACH, FLA -- (May 8, 2018) Members of the senior leadership of Fulcrum Partners LLC, executive benefits advisory, were among the thought leaders and influencers participating in this year's Annual Meeting of the Association for Advanced Life Underwriting ([AALU](#)). Held at the Marriott Marquis Washington, D.C., the three-day event kicked off on Sunday, April 29, and attracted top life insurance sales professionals, attorneys, CPAs, trust officers, and other financial and legal professionals.

Representing Fulcrum Partners at the meeting were Managing Directors: [Bruce Brownell](#), (Ponte Vedra Beach); [G. Scott Cahill](#), (Orlando); [Steve Broadbent](#) (Atlanta) and [Andrew Hart](#), (Washington D.C.). Andy Hart explained, "The opportunity to participate in professional development workshops, to meet and network with our peers, and to gain and share critical insights on how tax reform has impacted products such as corporate owned life insurance (COLI) are only a few of the reasons we participate in AALU conferences. Fulcrum Partners values the role the AALU plays addressing key issues of life insurance and tax reform, estate and gift tax reform, and industry regulation."

Political advocacy on behalf of the life insurance industry is at the core of AALU's mission and a politically involved membership is central to AALU's success. During the conference, Steve Broadbent spent an afternoon on Capitol Hill discussing the impact of the recent tax reform legislation on the life insurance industry and sharing ideas with staff members of Georgia's Senate and House delegations.

Scott Cahill conducted one of the conference break-out session workshops, covering the topic of business succession/continuity as explored through a case study of a medium-sized family business. He showed his peers how to structure a buy-sell agreement to skip one generation of estate taxes and how to develop incentive-based long-term incentive plans ([LTIP](#)) to retain and recruit professional (non-family) management without using company equity.

The theme of this year's annual meeting was "E4", which represents the insurance professional's commitment to "educate, engage, execute, and evolve". Keynote speakers included leadership, diversity and inclusion consultant Ritu Bhasin, former NBA player and current Food Network host Walter Bond, social psychologist and bestselling author Amy Cuddy, film and television producer and CEO of Not Impossible Mick Ebeling and research scientist Andrew McAfee.

Brighthouse Financial, John Hancock Insurance, Northwestern Mutual, Pacific Life, Principal and Prudential were a few of the 2018 AALU Annual Meeting's distinguished corporate sponsors.

Fulcrum Partners, an independent member of the BDO Alliance USA, is an executive benefit advisory with more than \$6 billion in assets under management and thirteen offices nationwide.

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/>.

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ABOUT AALU

For 60 years, AALU has been the trusted, influential voice for the life insurance community in Washington, DC. With a singular focus on the issues impacting life insurance products, professionals, and clients, AALU has a heritage of leadership and success.

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