



FOR IMMEDIATE RELEASE

**Fulcrum Partners Managing Directors to Speak at AALU Annual Meeting**

(PONTE VEDRA BEACH, FL April 23, 2019)– The Association for Advanced Life Underwriting (AALU), will hold its annual meeting April 28-30, 2019, in Washington, D.C. The conference, known as TRANSFORM 2019, is a time of connecting, learning and advocacy for financial professionals who provide life insurance and retirement planning solutions to individuals, families and businesses. Fulcrum Partners Managing Director [Steve Broadbent](#) and Managing Director [Andy Hart](#) will speak at TRANSFORM 2019 on the topic, “Selecting a COLI Carrier for the Long Run: The Producer’s Dilemma.”

“Corporate Owned Life Insurance or COLI,” said Steve Broadbent, “represents some of the longest-held financial instruments in America and is purchased by very

sophisticated teams of professionals within U.S. Companies. Fulcrum Partners has been involved with this market almost since its inception and has seen carriers come in, go out and in some cases completely abandon this business line.”

Andy Hart added, “COLI blocks are usually issued on dozens or even hundreds of lives and the period of ownership extends past the working life of the executives involved. Our session will examine some of the practical issues involved with carrier selection, along with the evaluation and funding of programs where carriers have altered the cost structure of their in-force product or left the market.”

Steve Broadbent is the Managing Director of Fulcrum Partners Atlanta, while Andrew Hart is the Managing Director of Fulcrum Partners Washington, D.C. Others attending from Fulcrum Partners include [Tom Chisholm](#), Managing Director Fulcrum Partners Chicago.

TRANSFORM 2019 will be hosted at the Marriott Marquis. For more information or to register for the event go to [aalu.org/annual-meeting/](http://aalu.org/annual-meeting/).

To learn more about putting COLI to work for your organization, helping you attract and retain top talent while protecting your company’s bottom line, contact the team of executive benefits professionals at Fulcrum Partners

[Fulcrumpartnersllc.com/team](http://Fulcrumpartnersllc.com/team). Headquartered in Ponte Vedra Beach (Jacksonville), Florida, Fulcrum Partners (fulcrumpartnersllc.com) now has thirteen offices coast-to-coast and is one of the largest and leading executive benefits consulting practices in the U.S.

**About Fulcrum Partners LLC:**

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; Los Angeles and Newport Beach, California; Portland, Oregon; Salt Lake City, Utah and Washington D.C. Fulcrum Partners is an independent member of the BDO Alliance USA.

*Advisory services offered through CapAcuity LLC and Valmark Advisers, Inc. SEC Registered Investment Advisors. Securities offered through Valmark Securities, Inc. Member FINRA, SIPC. Fulcrum Partners is a separate entity from Valmark Securities, Inc. and Valmark Advisers, Inc.*

CONTACT:

Bruce Brownell

904.296.2563

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