



FOR IMMEDIATE RELEASE

**Fulcrum Partners Managing Director Phil Currie Presenting on
Nonqualified Deferred Compensation**

PONTE VEDRA BEACH, FL -- (July 16, 2019) Fulcrum Partners Managing Director Phil Currie will be a featured presenter at the webinar, "Case Study Overviews," which is the second training event in an educational series designed to equip and inform financial advisors for incorporating nonqualified deferred compensation plans as part of their client services. The training program is presented by the National Association of Plan Advisors (NAPA) and is sponsored by Matrix Financial Solutions.

“The online session,” said Phil “will help financial advisors expand their knowledge of nonqualified plans. As employers compete to attract and retain top talent, many organizations are interested in the benefits of nonqualified plans, however few advisors have expertise in this area. Nonqualified deferred compensation plans are our strength and focus at Fulcrum Partners.”

[Phil Currie](#) heads the Fulcrum Partners offices in Newport Beach, California and in Salt Lake City, Utah. With more than 25 years of financial industry experience, Phil oversees employee and executive benefit programs for a nationwide clientele, including many Fortune 1000 companies.

Fulcrum Partners has more than \$7 billion in assets under management and is led by a team of fourteen managing directors who average more than 31 years in executive compensation and benefits consulting.

The webinar is scheduled for July 16, 2019, at 1 PM ET, and requires preregistration to attend.

About Fulcrum Partners LLC:

Fulcrum Partners (fulcrumpartnersllc.com) 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. Learn more about the Fulcrum Partners Team at fulcrumpartnersllc.com/fulcrum-partners-team/.

Securities offered through Lion Street Financial, LLC (LSF) and Valmark Securities, Inc. (VSI), each a member of FINRA and SIPC. Investment advisory services offered through CapAcuity, LLC; Lion Street Advisors, LLC (LSF) and Valmark Advisors, Inc. (VAI), each an SEC registered investment advisor. Please refer to your investment advisory agreement and the Form ADV disclosures provided to you for more information. VAI/VSI, LSF and BDO Alliance USA are non-affiliated entities and separate entities from Fulcrum Partners and CapAcuity, LLC.

Phillip Currie Jr is a registered representative of Valmark Securities Inc., Member FINRA, IPC. Valmark Securities Inc. is a separate entity from Matrix Financial Solutions, Fulcrum Partners, Independent Financial Partners and The Pangburn Group.

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Phil Currie, Fulcrum Partners Managing Director