



FOR IMMEDIATE RELEASE

**Fulcrum Partners Managing Director Phil Currie Speaking at
PLANADVISER National Conference**

PONTE VEDRA BEACH, FL -- (September 12, 2019) Fulcrum Partners Managing Director [Phil L. Currie Jr.](#) will be a featured speaker at the 2019 PLANADVISER National Conference (PANC 2019). The event will be held September 16 -18, 2019 at the JW Marriott Grande Lakes in Orlando, Florida. Designed exclusively for retirement plan advisers and consultants, the conference will attract elite members of the retirement planning profession from across the US.

Scheduled to present on Tuesday, September 17, 2019 on "The Value of Supplementary Plan Options," Phil Currie will discuss ways retirement advisers and consultants can help their clients attract, retain and reward the key employees and executives who drive the success of their business, while helping those employees better save for retirement. Joining Phil in discussing the topic will be Jeff Roberts, Regional Channel Manager, ADP.

"Retirement advisers," explained Phil, "are increasingly looking at adding supplementary plan options to their practice using cash balance, nonqualified deferred compensation and employee stock ownership plans (ESOPs) as ways to increase leads and drive deeper wallet share. During our presentation, we'll be discussing how advisers can integrate supplementary savings plans to help grow their practice while at the same time delivering additional value to their existing clients. We'll also focus on how to identify prospective opportunities."

For more than 25 years, Phil Currie has consulted in the employee and executive benefits field. His expertise includes designing executive benefit programs that align plan design features with corporate objectives and implementing employee benefit cost take out strategies. Phil serves a regional and nationwide clientele while

heading the Fulcrum Partners offices in Newport Beach, California and in Salt Lake City, Utah.

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 Advisers, 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.

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