



FOR IMMEDIATE RELEASE

Shortchanging Key Executives: New Report by Fulcrum Partners

PONTE VEDRA BEACH, FL -- (May 6, 2019) Fulcrum Partners, one of the nation's largest executive benefits advisories has released a report examining how companies may be unintentionally shortchanging the key executives they rely on most. The report, titled, ["The Benefits Gap: How it Happens and How to Fix It"](#) is available for download on the Fulcrum Partners website at www.fulcrumpartnersllc.com.

"As organizations deal with the effects and aftereffects of the COVID-19 pandemic, retaining their key executives and decisionmakers is more important than ever," said Scott Cahill, a Partner & Managing Director at Fulcrum Partners. "Often, neither

Compensation Committees nor the executives themselves realize that the corporate spend for the disability and retirement plans of top leadership, based on percentage of salary, typically falls short, when compared to what a company is spending on its core employees.”

“The Benefits Gap: How it Happens and How to Fix It” shares specific examples illustrating how key executives fall short in group long term disability and retirement benefits. The report also includes examples of income protection and retirement plan solutions.

“By following IRS Section 409A rules and deferring tax deductions, for example, an employer can allow eligible participants to defer, on a pre-tax basis, up to 100 percent of compensation,” said Partner & Managing Director, Bruce Brownell. “This strategy can restore benefits lost to the key executive because of 401(k) limitations. But the emphasis here is on ‘adhering to 409A regulations’.

“Each situation has unique considerations, especially as companies work to stay in compliance with loans, tax breaks or other relief they may have secured during the COVID-19 pandemic. This report is timely and, for many, eye opening.”

To read or download the report, visit *Deferred Compensation News and Updates* (www.fulcrumpartnersllc.com/news/). Or click: [The Benefits Gap: How it Happens and How to Fix It](#).

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/.

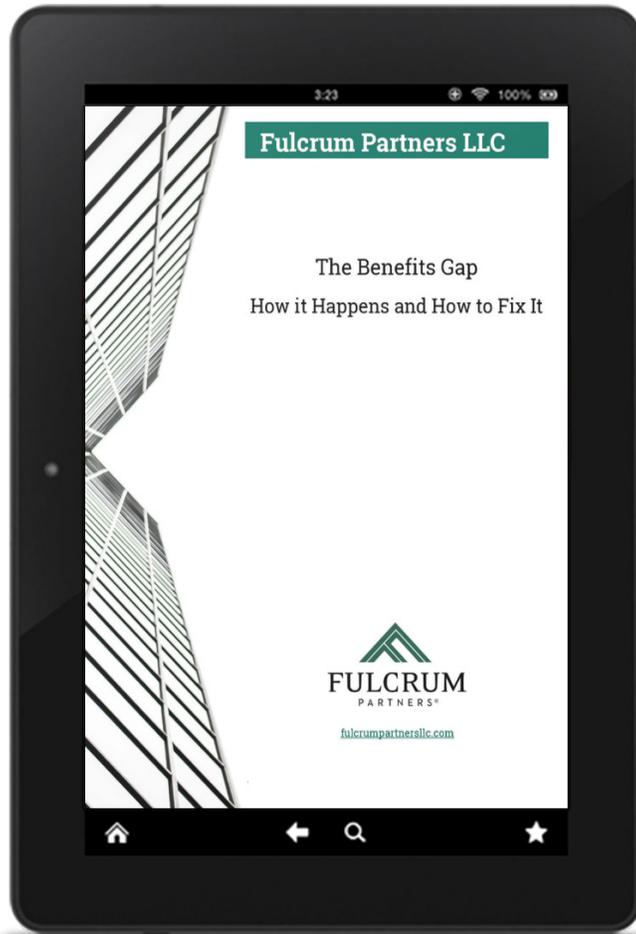
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