



FOR IMMEDIATE RELEASE

Fulcrum Partners Announces Strategic Acquisition by OneDigital

PONTE VEDRA BEACH, FL -- (January 28, 2021) Fulcrum Partners, one of the nation's leading and largest executive benefits advisories, announces it has been purchased by OneDigital Investment Advisors in a strategic acquisition. OneDigital Investment Advisors, a registered investment advisor and a wholly owned subsidiary of [OneDigital](#), is one of the nation's leading strategic advisory firms. Focused on streamlining benefits solutions for employers of all sizes, OneDigital pursued the acquisition of Fulcrum Partners as part of its expansion into the nonqualified deferred compensation plan market.

[Bruce Brownell](#), Managing Director and Partner, along with Directors and Partners Joe Thompson and G. Scott Cahill, founded Fulcrum Partners in 2007. Bruce said, "For more than a decade, we have continually grown and adapted to serve our client's needs and the industry's evolving parameters. In making the choice to become part of the OneDigital team, we will be positioned to bring to all our valued clients a broader and deeper base of tools, services and support."

"By adding these specialists to our team," said Vince Morris, President, OneDigital Retirement + Wealth, "we are excited to expand our holistic benefits offerings to include executive compensation strategies. Our focus is on getting everyone to and through retirement. The team of industry professionals from Fulcrum Partners adds an additional level of strategy to support business and ensure that we are providing individualized financial advice and tax planning assistance to all."

[Steve Broadbent](#), Fulcrum Partners Managing Director and Partner, said, "Our clients, peers and vendors have told us that they have been unaware that Fulcrum Partners was in this growth transition. That's because the process has been, and will continue to be, seamless."

Managing Director and Partner [Scott Cahill](#) added, "Most importantly, our client relationships are not changing. We will continue to operate with the responsiveness, latitude and individualized service we have always provided and the same one-on-one

client engagement. But now, as part of the OneDigital team, we'll have broader and deeper resources to draw on when delivering creatively designed executive benefits solutions."

With the acquisition of Fulcrum Partners, OneDigital's comprehensive advisory services and market-leading solutions are offered in more than 100 offices and an additional 45-plus retirement wealth offices across the United States. To learn more about the executive benefit advisory professionals and the services of Fulcrum Partners, follow [*Deferred Compensation News*](#).

About OneDigital

[OneDigital](#) is a leading strategic advisory firm in the U.S. and has consistently led from the front as a workplace ally for 20 years. OneDigital's ability to converge health, wealth and human resources into a hub of services and business guidance has empowered companies to create workplaces that attract and retain talent while fueling innovation and company growth. As employee healthcare, wellness and workplace benefits continue to shift, companies of all sizes have relied on OneDigital's advisory teams for counsel and its adjacent services, including employee benefits, holistic HR services, retirement and wealth management, employee wellbeing and pharmacy consulting. Headquartered in Atlanta, OneDigital's more than 100 offices and 2,400+ business strategists serve the needs of over 60,000 employers across the nation.

OneDigital has been named to the [Inc. 5000 List of America's fastest-growing companies](#) every year since 2007, one of only 11 companies to do so. Currently listed as 18th on Business Insurance's list of 100 Largest U.S. Brokers, OneDigital's deep analytic abilities and experienced advisors deliver insights that reduce business risk and improve plan design and performance. For more information, visit www.onedigital.com. Investment advice offered through OneDigital Investment Advisors, an SEC-registered investment adviser and wholly owned subsidiary of OneDigital. This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, accounting, legal or tax advice. Any tax advice contained herein is of a general nature. You should seek specific advice from your tax professional before pursuing any idea contemplated herein.

About Fulcrum Partners LLC:

Fulcrum Partners (fulcrumpartnersllc.com) With a team of experienced industry professionals who serve with diverse skill sets, targeted experience and in-depth expertise in executive compensation and benefits consulting, the financial professionals at Fulcrum Partners focus on an integrated approach to the design, financing and plan administration of executive benefits programs. Fulcrum Partners LLC was established as 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 and Cleveland, 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.

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 CapAcuity, LLC. are non-affiliated entities and separate entities from OneDigital and Fulcrum Partners.

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