



Monte Harrick

Senior Vice President – Retirement



7705 Irvine Center Dr.
Irvine, California 92618

C: 626.437.2896

monte.harrick@fulcrumpartnersllc.com

Before joining Fulcrum Partners LLC as a Managing Director, Monte Harrick was affiliated with a Los Angeles-based executive benefit advisory for more than nine years. As a Managing Director, he specialized in working with large corporations in attracting and retaining top talent, specifically as related to executive benefits. His responsibilities included analyzing and consulting with corporations on the design, funding, and administration of leading nonqualified benefit plans and welfare benefit plans.

With a solid history in executive benefit consulting, Monte has been a Senior Vice President at Clark Consulting (1999 – 2008) and previously at Compensation Resource Group, CRG (1993 – 1999). His areas of focus have included: consulting on nonqualified benefit plans, designing funding vehicles to finance benefit liabilities, reviewing and recommending security devices to protect executive benefits, and coordinating the placement of administration teams to handle client nonqualified plans.

Committed to helping young people, Monte has spent 15 years planning and supervising annual week-long youth trips for over 120 teenagers, setting up youth workshops and activities geared to building self-esteem and self-confidence. With a passion for sports first fostered by his dad, NCAA Men's Basketball Championship Coach, Jim Harrick, (UCLA 1995), Monte has devoted countless volunteer hours to youth sports programs in the Greater Los Angeles area.

- Member [Society of Financial Service Professionals](#)
- Board Member, San Gabriel Valley Council of the Boy Scouts of America (now part of the [Greater Los Angeles Area Council GLAAC](#)) (1998 to 2011)
- Past Chair of Boy Scouts of American Celebrity Sports' Breakfast, featuring Heisman Trophy winners, former Olympians, and other sports celebrities to raise money for youth organizations
- Past Commissioner of La Canada Spartan Basketball League, 2013-2017

Degrees, Certifications, and Registrations

- Series [6](#), [63](#) and [Series 65](#) registered
- Brigham Young University, Provo, Utah, Bachelor of Arts, International Relations

Publications and Presentations

Expertise

Consulting with large and small corporations in helping their key employees delay the taxation on compensation for as long as possible. Accomplishing this objective by assisting these companies in designing creative pre-tax and after-tax savings strategies that fit the culture and goals of the organization.

View on the Fulcrum Partners website: <https://www.fulcrumpartnersllc.com/team/monte-harrick/>

Monte Harrick is affiliated with Valmark Securities, Inc. Securities offered through Valmark Securities, Inc. Member [FINRA](#), [SIPC](#), 130 Springside Drive, Suite 300, Akron, OH 44333. 800-765-5201. OneDigital and Fulcrum Partners are separate entities from Valmark Securities, Inc.

CA License #0771797

Check the background of this investment professional on [FINRA's BrokerCheck](#)

EXPERTISE that INSTILLS CONFIDENCE®

Check the background of the Fulcrum Partners investment professionals on [FINRA's BrokerCheck](#).

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. Unless otherwise noted, VAI/VSI, LSF and BDO Alliance USA are not affiliated, associated, authorized, endorsed by, or in any way officially connected with any other company, agency or government agency identified or referenced in this document.

This site is published for residents of the United States only. Registered Representatives and Investment Advisor Representatives of Valmark Securities, Inc., Valmark Advisors, Inc., Lion Street Financial, LLC., or Lion Street Advisors, LLC. may only conduct business with residents of the states and jurisdictions in which they are properly registered. Therefore, a response to a request for information may be delayed. Not all of the products and services referenced on this site are available in every state and through every representative or advisor listed.