



FOR IMMEDIATE RELEASE

Phil Currie, Fulcrum Partners, to Speak at Nonqualified Plan Advisor Conference

ATLANTA, GA -- (October 20, 2021) [Phil Currie](#), Senior Vice President, Fulcrum Partners, a OneDigital Company, will be a featured speaker at the NAPA Nonqualified Plan Advisor Conference. Scheduled for October 24-26, 2021, the event, "Enhance | Expand | Differentiate" will be hosted in Dallas, Texas, at the Gaylord Texan Resort and Convention Center.

Presenting during General Session 5 on Monday afternoon, Phil, along with OneDigital Retirement Plan Consultant, Corby Dall, will present a Plan Sponsor Mock Annual Review. This hour-long, informative session will look at best practices for periodic plan reviews, including how to handle the balance that exists when an advisor is also a fiduciary to a qualified plan with the same plan sponsor.

"I am honored to be presenting during the NAPA Nonqualified Plan Advisor Conference, representing OneDigital and Fulcrum Partners," said Phil. "As the nation bounces back from the pandemic, plan sponsors and participants have questions and planning needs like never before. Helping stabilize the financial wellness and retirement security of working Americans, and in turn strengthening and stabilizing organizations, are essential needs in today's challenging workplace."

Among the many other notable speakers are Rhonda Miller, SVP NQ Consulting, Prudential and Mike Brennan, Corporate Owned Life Insurance (COLI) Field Director, New York Life. Also representing Fulcrum Partners, a OneDigital Company, at the conference will be [Managing Director Mike Powers](#) and [Adam Monson](#), Vice President of Retirement.

Retirement plan, wealth management or employee benefits advisors looking to enhance and differentiate their value proposition in a post-COVID world, can register for the conference at <https://napanqdcforum.org/#Register>.

To learn more about the opportunities of nonqualified deferred compensation plans, supplemental executive retirement plans (SERPs) and other incentive compensation and golden handcuff plans may contact [Phil](#), [Adam](#) or any member of the Fulcrum Partners team at fulcrumpartnersllc.com/fulcrum-partners-team.

For updates on how organizations and executives can benefit from creative and customized nonqualified deferred compensation plan design, follow [Deferred Compensation News](#).

About Fulcrum Partners, a OneDigital Company

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, a OneDigital Company, focus on an integrated approach to the design, financing and plan administration of executive benefits programs. Originally founded in 2007, today the company is part of the OneDigital advisory firm and has executive benefits advisory offices in Atlanta, Georgia; Chicago, Illinois; Charleston and Bluffton, South Carolina; Columbus and Cleveland, Ohio; Delray Beach, Orlando and Ponte Vedra Beach, Florida; Los Angeles and Newport Beach, California; Portland, Oregon; Salt Lake City, Utah and Washington D.C.

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.

About NAPA:

The National Association of Plan Advisors, an affiliate organization of the [American Retirement Association](#), was created by and for retirement plan advisors. Membership is also open to other retirement industry professionals who support the interests of plan advisors.

While the financial services industry is well represented in Washington by a number of trade associations that weigh in on issues affecting advisors, NAPA is the only advocacy group exclusively focused on the issues that matter to retirement plan advisors. This exclusive focus is what sets NAPA apart.

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Images included below: Phil Currie, SVP, Fulcrum Partners, a OneDigital Company



