



FOR IMMEDIATE RELEASE

Steve Broadbent and Sam Robert, Fulcrum Partners, Presenting at 2022 Advanced Practice Symposia

Atlanta, GA – (April 13, 2022) Representing [Fulcrum Partners](#), a OneDigital Company, a leading executive benefits consulting firm, Steve Broadbent and Sam Robert will be featured presenters at the NAIFA-FSP 2022 Advanced Practice Symposia. Presented by NAIFA and the Society of FSP (Financial Services Providers), the Advanced Practice Symposia will present thought leaders in advanced financial planning.

The high-impact, half-day event, which will be the first of three in a series, will be held on April 28, 2022, in Indianapolis at 502 East Event Center in Carmel, Indiana. [Steve Broadbent](#), Senior Vice President Retirement, and [Sam Robert](#), Vice President Retirement, will speak on “Expanding Your Business Client Opportunities with Nonqualified Benefits.”

“Nonqualified executive benefits, such as [deferred compensation plans](#),” said Steve Broadbent, “position wealth advisors and financial and retirement

planners to bring tremendous value to their business clients. Executives are looking for additional pre-tax opportunities to defer compensation and accumulate greater wealth for retirement. Employers are looking beyond the 401(k) for ways to retain key talent with attractive company-funded benefits.”

The Society of Financial Service Professionals and the National Association of Insurance and Financial Advisors created the Center of Excellence to offer events, such as the Advanced Practice Symposia Event Series, to ensure that agents and advisors have the most up-to-date information and access to leading experts for complex cases. Symposia attendees may be eligible for Continuing Education Credits (CEUs).

Sam Robert said, “Our presentation will help financial professionals understand the basics of nonqualified benefits and how these benefits help them better serve their clients’ objective to recruit and retain key talent in today’s competitive workplace. Most importantly, we’ll cover how financial professionals can identify opportunities for nonqualified benefits in their market.”

Fulcrum Partners, a OneDigital Company, joins Ameritas, Pacific Life and SMA as an event sponsor. Additional information and online registration for the Symposia are available on the NAIFA website <https://apc.naifa.org/>. Subsequent Symposia events are scheduled for June 9 in Phoenix and September 29 in Philadelphia.

Learn more about Steve Broadbent, Sam Robert and other executive benefits advisory team members at Fulcrum Partners, a OneDigital Company (fulcrumpartnersllc.com/team/). To find out more about how organizations and executives can benefit from [nonqualified deferred compensation](#) (NQDC) plans, 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 skillsets, 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; Cleveland, Ohio; Delray Beach, Orlando and Ponte Vedra, Florida; Los Angeles and Newport Beach, California; Portland, Oregon; Salt Lake City, Utah; Dallas/Fort Worth, Texas and Washington D.C.

About OneDigital

OneDigital delivers strategic advisory consulting and technology-forward solutions to more than 85,000 employers across the nation. As employee health care, wellness and workplace benefits continue to converge, business of all sizes have relied on OneDigital's exceptional advisory teams for counsel in employee benefits, wellbeing, human resources, pharmacy consulting, property and casualty solutions, as well as the retirement and wealth management services provided through OneDigital Investment Advisors. OneDigital's commitment to technology and innovation enables its 2,800 advisors to deliver the most modern and intuitive customer experience anywhere in the industry. Investment advice is offered through OneDigital Investment Advisors, an SEC-registered investment adviser and wholly owned subsidiary of OneDigital.

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