



FOR IMMEDIATE RELEASE

## **Monte Harrick and Sam Robert of Fulcrum Partners Will Be Featured Presenters at NAIFA-FSP Advanced Financial Planning Symposium**

Atlanta, GA – (May 24, 2022) Monte Harrick and Sam Robert will represent [Fulcrum Partners](#), a OneDigital Company, as featured presenters at the NAIFA-FSP 2022 Advanced Practice Symposium. Hosted by **the** National Association of Insurance and Financial Advisors (NAIFA) and the Society of Financial Services Providers, the Advanced Practice Symposium presents premier thought leaders in advanced financial planning.

Scheduled for June 9, 2022, in Phoenix, the event will be held at The Scott Resort & Spa, in Scottsdale. Fulcrum Partners Senior Vice President Retirement, [Monte Harrick](#), and Vice President Retirement [Sam Robert](#) will speak on “Expanding Your Business Client Opportunities with Nonqualified Benefits.”

“Fulcrum Partners, a leading executive benefits consulting firm, is excited to partner with NAIFA for its Advanced Financial Planning Symposiums,” said Monte Harrick, Senior Vice President Retirement. “Our section of the Symposium will focus on why and how companies utilize and finance nonqualified benefit plans and how to leverage these important programs within an advisor’s practice.”

“Executives are looking for additional pre-tax opportunities to defer compensation and accumulate greater wealth for retirement,” said Sam Robert. “Employers are looking beyond the 401(k) for ways to retain key talent with attractive company-funded benefits. This presentation will help attendees understand the basics of nonqualified

benefits and how these benefits assist client companies with recruiting and retaining top talent.”

The Society of Financial Service Professionals and the National Association of Insurance and Financial Advisors created the Center of Excellence to offer the Advanced Practice Symposia Event Series, to ensure that insurance agents and financial 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) in Insurance and Legal (CLE), Accounting (SPE), CERTIFIED FINANCIAL PLANNER™ CFP and Professional Recertification.

Other distinguished presenters include Mark Massey, Vice President SMA Services and Andrew Rinn, VP Advanced Markets and Competition & Case Design Ameritas. More information and online registration for the Symposia are available on the NAIFA website <https://apc.naifa.org/>. A future Symposia event is scheduled for September 29, 2022, in Philadelphia.

Learn more about Monte Harrick, Sam Robert and other executive benefits team members at Fulcrum Partners, a OneDigital Company ([fulcrumpartnersllc.com/team/](https://fulcrumpartnersllc.com/team/)). To better understand 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](https://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 Irvine, 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, businesses 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 3,000 advisors to deliver the most modern and intuitive customer experience anywhere in the industry.

OneDigital has been named as a Best Place to Work in Insurance by Business Insurance. For more information, visit [OneDigital.com](https://www.onedigital.com).

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