

# G. Scott Cahill, Sr.

CLU®

Managing Director

As a senior advisor at FinSec Life, G. Scott Cahill, Sr. devotes his time to ensuring that families keep their businesses where they belong...in the family. Relying on experience gained over the last 40+ years in the executive benefits and life insurance profession, Scott consults alongside the other FinSec Life advisors and consultants.

"My purpose," said Scott, "is to assist medium to large family businesses with the various challenges of ownership succession. Closely held businesses face unique liquidity and leadership challenges when passing financial responsibilities from generation to generation. Growing up in an entrepreneurial family, I learned the values and principles required for managing wealth and generosity from a generational perspective."

In 1988, Scott joined the Orlando, Florida executive benefits firm, James B. Greene & Associates. He worked at the firm until the CEO's passing later that year. He then bought and managed the firm while serving its clients, many of whom are still wonderful clients to this day.

In 2007, Scott co-founded Fulcrum Partners, LLC., a fully independent Executive Benefits consulting and brokerage firm. Over the next 13 years, he co-led Fulcrum Partners to become one of the country's largest and most respected executive benefit consulting firms.

In 2020, Fulcrum Partners was strategically acquired and integrated into a large multiline insurance brokerage and consulting company. Over the next three years, Scott worked closely with his clients and succession team to facilitate a smooth transition. "Now," says Scott, "I am off to the next chapter, serving families and their businesses with the talented team at FinSec Life."

Outside of work, much of Scott's time is spent at the beach with his family or on the ski slopes. Scott and his wife, Joanie, also invest their time with several faith-based ministries. Scott currently serves as board chair for the Luis Palau Association. Joanie has been in a leadership role for one of the Central Florida Bible Study Fellowship groups for the last 25 years.

## CONTACT

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**FINSEC LIFE**

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## EDUCATION & CREDENTIALS

- Chartered Life Underwriter (CLU)
- Series 39 – Direct Participation Programs Principal Exam License
- Series 63 – UUniform Securities Agent State Law Exam License
- California License #OH24135
- University of South Florida, Bachelor of Science in Finance

*G. Scott Cahill, Sr., CLU® is affiliated with Valmark Securities, Inc. Securities offered through Valmark Securities, Inc. member FINRA, SIPC. Investment Advisory Services offered through Valmark Advisers, Inc. a SEC Registered Investment Advisor. 130 Springside Drive, Suite 300, Akron, OH 44333. 800-765-5201. FinSec Life is a separate entity from Valmark Securities, Inc. and Valmark Advisers, Inc.*

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

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