



# Adam Monson

## Financial Consultant



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Skilled in relationship building and relational interaction, Adam brings both old school values and visionary creative thinking to every project and every client engagement. Previously with Northwestern Mutual, Adam has been awarded both the Northwestern Mutual Pacesetter First 40 Award, which is earned by only the highest achieving eleven percent of the company's financial advisors nationwide, and the Northwestern Mutual Pacesetter Second 60 Award, earned by less than two percent of the company's financial advisors nationwide. At the time he received the Pacesetter Second 60 award, Adam was the first recipient of the honor in twelve years at the company's Newport Beach office. In 2014, he also earned the Bronze Award as a top tier, first-year advisor.

Adam has been actively involved in community service (both in Orange County California and on an international level in Kenya and Nicaragua) and is the co-founder and COO of Kitchen Wizard, a technology startup, and an angel investor and advisory board member of Fusion Brakes.

- Senior of the Year Recipient, Chapman University (May 2013)
- Man of Integrity Recipient, Chapman University (March 2013)
- President of the Year Recipient, Chapman University, Order of Omega (May 2013)
- Paul Harris Fellow, Tucson Rotary (May 2009)
- Junior Achievement Volunteer
- Big Brother in Big Brothers Big Sisters of Orange County

## Degrees, Certifications, and Registrations

- Series 6 and 63 registered
- California Department of Insurance – California Life and Health License
- Chapman University, The George L. Argyros School of Business and Economics, B.S. Business Administration, Finance, and Entrepreneurship

## Publications and Presentations

- Fulcrum Partners Los Angeles Expands with New Offices in Newport Beach (March 23, 2017)

## Expertise

- Adam is a servant leader, defined by hard work, character, and growth experiences that include his years as an Eagle Scout, Resident Advisor, Chapman University Ambassador, and Secretary, Recruitment Chair, and President of Phi Kappa Tau, where he led his fraternity to win national awards for recruitment and Chapter excellence.

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

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