



**Brent Sheppard, CRPS® AIF®**  
*Partner, Financial Advisor*  
**Cadence Financial Management**

Brent has earned the Chartered Retirement Plans Specialist® and Accredited Investment Fiduciary® designations. He is a member of the National Association of Plan Advisors (NAPA) and Association for Corporate Growth (ACG).

Brent helps companies design and manage innovative retirement benefit plans, financial wellness programs, and customized executive services. What he is most proud of is seeing his clients, their organizations, and their employees achieving their financial goals.

Brent has been named Top 401 Retirement Advisor by the Financial Times, Top 100 Retirement Plan Advisors Under 40 by NAPA, Top Retirement Plan Adviser by PLANADVISER and is frequently invited to speak at industry conferences such as PLANSPONSOR, SPARK Institute, and SHRM. He is also a graduate of the University of Delaware with his Series 7, 63, and 66 securities licenses.



**Mike Shamrell**

*Vice President, Workplace Thought Leadership*  
**Fidelity Investments**

Mike Shamrell is Vice President, Workplace Thought Leadership, for Fidelity Investments, one of the industry's leading providers of workplace benefits and retirement solutions.

In his current role Mike helps identify and analyze industry trends and developments in the retirement and employee benefits industry, providing insight to clients to help them derive maximum benefit from their workplace benefits programs.

Since joining Fidelity in 2006, Mike has held a variety of communications and marketing positions, primarily focusing on trends and solutions in the employee benefits space. Prior to joining Fidelity, Mike held communications positions at IBM, focused on the company's software products and offerings.

Currently a long-term resident of Boston, Mike is originally from Arizona and holds a degree in Economics from the University of Arizona.