



**Brendan P. Speers, AIF®, CPFA**  
*Partner | Director of Retirement Plan Services*  
**Legacy Planning**

As the Director of Retirement Plan Services, I specialize in helping businesses, non-profits and governmental entities manage all aspects of their employer sponsored retirement plans. I also manage the plan administration, conversion and participant education teams that support our plan sponsors.

I graduated from Duquesne University's A.J. Palumbo School of Business with a Bachelor of Science in Business Administration and hold an Executive Certificate in Financial Planning from Duquesne University's School of Leadership. I am an Accredited Investment Fiduciary® (AIF®) and a Certified Plan Fiduciary Advisor (CPFA).

Before joining Legacy Planning in 2014, I worked with universities, school districts and hospitals in the large market for retirement plans. Legacy Planning's Retirement Plan Services division was founded on the thought that all retirement plans, regardless of size, should utilize a large market approach to due diligence, oversight, and pricing to help employers and participants achieve better outcomes.