



**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.



## Patrick Delaney

**Vice President  
Insights Director**

Patrick is a Vice President of T. Rowe Price Investment Services, Inc., and an Insights Director in the Practice Management Team within U.S. Intermediaries.

Patrick develops and delivers thought leadership, provides consultative services to financial professionals and is a frequent speaker at client events and industry conferences.

He is focused on helping financial professionals understand and adapt to the changing face of wealth in the United States. Patrick is passionate about the psychological aspects of our industry: how emotion influences investors' decision-making process, and how advisors can tap into emotion to better engage and serve their prospects and clients.

### Key Experience

- More than 25 years in the financial industry.
- Joined T. Rowe Price in 2000.
- Series 7 and 63 registered representative and state-registered broker-dealer.
- B.A. in economics from Gettysburg College.
- Patrick's professional background includes roles in client service, marketing, and sales, both within the retirement plan and wealth management advisor ecosystems.

### Personal Information

Patrick and his two daughters reside just north of Baltimore. He enjoys writing, hiking, and traveling—especially when the trip is built around a great sporting event or live music. He sings in the car, drives with intention, and is particularly adept at sports involving a racket or paddle. He rarely leaves a crab feast early and revels in watching his daughters run track or play field hockey.

### Contact Information

#### Patrick Delaney

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Insights Director

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