



Sheldon Nix, WMCP®, RICP®, C(k)P®
Co-Founder & CEO
Exceed Wealth & Retirement Group

Sheldon Nix is the co-founder and CEO of Exceed Wealth & Retirement Group and the creator of The Retirement Plan Roadmap™. He appears as a financial expert on "My Money Planners Show," featured on Roku and YouTube. Leading a team of seven advisors across offices in Los Angeles, Sacramento, and Dallas, Sheldon has overseen the addition of \$100 million in Assets Under Advisement (AUA) over the past year. As a seasoned speaker and panelist, he is widely recognized for his expertise in financial planning and retirement strategies.



Bradley J. Bartells, CPA

Partner

MUN CPAS, LLP

Bradley Bartells is a Partner at MUN CPAs in Sacramento, where he leads the firm's retirement plan audit practice. With over 25 years of experience, Brad specializes in providing assurance services to various retirement plans, including 401(k)s, 403(b)s, and ESOPs. His dedication to risk mitigation and assisting plan sponsors with their oversight responsibilities drives his passion for working with retirement plans. Outside of work, Brad enjoys golfing, exercising, and camping.

Affiliations

- Former board member, National Institute of Pension Administrators, Sacramento Chapter
- Former board member, Western Pension and Benefits Council, Sacramento Chapter
- Former board member, Inderkum High School Athletic Booster Club
- Former board member, Fairytale Town

Education

- University of Redlands, Bachelor of Science in Accounting