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.

Sue Walton

Sue Walton is a senior retirement strategist at Capital Group, home of American Funds. She has 27 years of industry experience and has been with Capital Group for nine years. Prior to joining Capital, Sue was a director at Towers Watson Investment Services. Before that, she was an investment consultant at Mercer Investment Consulting and Ellwood Associates. She holds an MBA from DePaul University with a concentration in finance and a bachelor's degree in business administration, economics and international business from Marquette University. Sue is based in Chicago.