Lisa Buffington, AIF®, CPFA®
SVP, National Brand Market Leader
Marsh McLennan Agency

Lisa works with retirement Plan Sponsors to help them optimize workplace retirement plans and financial wellness benefits as to enable their employees to achieve their goals for retirement and financial security. In her role as Senior Vice President, Lisa works with both for-profit and non-profit organizations. She works directly with finance, human resources, and benefits groups to assist with all aspects of their retirement plan, benefits and compensation strategy. She takes an active role in all aspects of the consulting relationship including (but not limited to) fiduciary governance and oversight, plan design guidance, fee analysis and benchmarking, vendor management, investment evaluation, compliance support and education strategy implementation. Lisa is a member of MMA New England's Investment Committee and MMA's National Financial Wellbeing Steering Committee. She has been acknowledged as one of PLANADVISER's Top Financial Advisors for 2023, 2024, and 2025. Lisa has been named as National Association of Plan Advisors (NAPA's) Top Women Advisors for 2018 through 2025. She participates on NAPA's Leadership Council and was the 401(k) Summit Steering Committee Co-Chair for 2022 and 2023. She is also a member of the industry's national Retirement Advisor Council (RAC) as a Board Member and co-chairs the RAC's financial literacy committee. Lisa was awarded Plan Advisor of the Year in 2025 by the Plan Sponsor Council of America (PSCA) – nominated by plan sponsors for fiduciary governance excellence, improved retirement plan outcomes, and custom award-winning financial wellness programs.

Prior to joining MMA, Lisa was previously employed at Prudential Retirement for 27 years, most recently as the Regional Sales Director for New England and former Key Account Client Manager. She also led Prudential's Sales Development and Channel Management teams with a focus on building a sales pipeline, leading key sales initiatives, developing sales talent, and maximizing strategic partnerships with home office and regional key advisors and consultant teams for 401k, DB, and NQ plans.

Lisa has a strong passion for women's professional development, financial literacy education, and urban city K-12 educational reform. She has served as the past president of the Women in Pensions Network's national group (WIPN) and worked directly with the team responsible for launching WIPN's non-profit organization. Her dedication to non-profits does not end there as she also serves as board chair for a start-up non-profit charter management organization, Capital Preparatory Schools, and is actively involved in Junior Achievement.

Member of NAPA Top DC Advisor Multi-Office Firms
2025, 2024, 2022, 2021, 2020, 2019, 2018, 2017

National Association of Plan Advisors (NAPA) Top Women Advisors
2025, 2024, 2023, 2022, 2021 2020, 2019, 2018

Plan Sponsor Council of America (PSCA) Named Plan Advisor of the Year
2025

PLANADVISOR Top Retirement Plan Adviser
Top Retirement Plans Under Advisement 2023-2025
Top Retirement Assets Under Advisement 2023-2025

PLANADVISER Advisor of the Year Finalist - Mentorship
2022

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Ann Margaret Donnelly
Senior Sales Executive | Retirement Services
Marsh McLennan Agency

As a Senior Sales Executive within Retirement & Wealth at Marsh McLennan Agency (MMA) Northeast, Ann Margaret aims to help your organization maximize retirement plan efficiencies and outcomes so that your employees can achieve their goals for retirement. She works with organizations' finance, human resources, and benefits groups to assist with all aspects of their retirement plans, including fiduciary guidance and training, plan design, fee analysis and benchmarking, vendor management, investment selection and monitoring, and compliance, as well as participant communication, education, and financial well-being strategies.

Ann Margaret has been with Marsh McLennan Agency since early 2024. Prior to that, she held Senior Retirement Plan Advisor roles at leading investment and finance companies where she focused on building the sales pipeline, key sales initiatives, developing talent, and maximizing strategic partnerships with home office and regional key advisor and consultant teams for 401(k), defined benefit (DB), and nonqualified (NQ) plans. Ann Margaret worked in equity capital markets and owned a conference and event center for over 10 years in Aurora, CO.

Ann Margaret graduated Cum Laude with her BS in Business Administration from Villanova University. She also obtained her MSc in Finance and Accounting from The London School of Economics and Political Science. She currently holds FINRA Series 6 and 65 licenses and previously held FINRA Series 7 and 63.

Ann Margaret enjoys skiing, hiking, and biking and is the proud mother of two college-aged children, Cara and Ryan.

Member of NAPA top DC Advisor Multi-Office Firms

2024, 2022, 2021, 2020, 2019, 2018, 2017

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Director of Retirement Sales Execution

Michael J. Dullaghan, AIF®

Director of Retirement Sales Execution
Retirement & Insurance

Background

Mike Dullaghan is Director of Retirement Sales Execution for Franklin Templeton. He is responsible for providing thought leadership, promoting new content, and delivering the tools and resources that help enable the Retirement team to effectively market Franklin Templeton products. Mr. Dullaghan is a regular contributor to Kiplinger's "Building Wealth" newsletter. Previously at Putnam Investments, he was the Director of Content and Sales Enablement for Putnam's DCIO Team. Mr. Dullaghan received his Retirement Income Certificate, or RI(k) from the National Association of Plan Advisors (NAPA).

Credentials and awards

Mike earned a Bachelor of Arts in Government and Economics from The College of William and Mary. He is an Accredited Investment Fiduciary® and holds his Series 7, 26, 31, 63, and 65 licenses with FINRA.

Personal

Mike currently resides in Virginia with his wife and four daughters. In his free time Mike jogs, serves on his church management team, and is a professional napper.

Our unmatched range of specialist managers provides our clients deep expertise across asset classes, investment styles, and geographies. All with a single focus: delivering better client outcomes.

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