



Brendan P. Speers, AIF® , CPFA, C(k)P®
Senior Vice President
HUB Retirement & Wealth Management

Brendan P. Speers brings more than a decade of specialized retirement plan experience to the classroom — and he speaks the language of plan sponsors because he works alongside them every day.

As Senior Vice President of Retirement Plans at HUB Retirement & Wealth Management, one of the nation’s leading insurance and advisory firms, Brendan leads a dedicated retirement plan team that serves employers across a broad range of industries and plan sizes. His practice is built on a foundational belief he has held since the earliest days of his career: that every retirement plan — regardless of size or complexity — deserves the same rigorous standard of fiduciary oversight, investment due diligence, and participant advocacy that has long defined the large-market institutional space.

Before joining HUB, Brendan served as Partner and Director of Retirement Plan Services at Legacy Planning, where he built and led the firm’s retirement division from the ground up. His career began working with universities, school districts, and hospitals on large-market retirement programs — an experience that shaped his deep respect for fiduciary process and his conviction that documentation, governance, and participant outcomes are never optional.

Brendan holds the Accredited Investment Fiduciary® (AIF®) designation, awarded by fi360; the Certified Plan Fiduciary Advisor (CPFA) credential, issued by the National Association of Plan Advisors (NAPA); and the Certified 401(k) Professional [C(k)P®] designation, awarded by The Plan Sponsor University — three of the most respected credentials in the retirement plan advisory profession. He earned his Bachelor of Science in Business Administration from Duquesne University’s A.J. Palumbo School of Business and holds an Executive Certificate in Financial Planning from Duquesne University’s School of Leadership.

As an Adjunct Lecturer with The Plan Sponsor University, Brendan leads semi-annual in-person fiduciary training events designed specifically for plan sponsors, HR professionals, CFOs, and members of plan committees. These sessions translate complex ERISA requirements, fiduciary duties, and plan governance best practices into actionable frameworks that attendees can apply immediately within their organizations. Participants leave with a clearer understanding of their obligations under the law — and a stronger foundation for protecting both their employees and themselves.

Continuing education credits are available for RCH, CPE, HRCI, and SHRM. Seating is limited. Plan sponsors are encouraged to register early.



Sue Walton

Sue Walton is a senior retirement strategist at Capital Group. She has 28 years of industry experience and has been with Capital Group for 10 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.