



**Brett Shofner**

Principal

### *Profile*

Brett is an Accredited Investment Fiduciary working at Work Plan Retire and is currently enrolled in the TRAU Retirement Advisor University program, the first retirement planning certification program associated with a nationally recognized institution of higher learning that is offered through UCLA's Anderson School of Management.

He has been on several National Advisory Boards of top 401k providers such as Prudential, ING and Alliance Bernstein. He is a frequent speaker at client and industry events and conferences.

Before joining Work Plan Retire in 2001, Brett was Vice President of Retirement Consulting for 401k Exchange, an industry research firm. He assisted employers with the implementation of Qualified Plans in the State of Florida.

Prior to 401k Exchange, Brett was with Ivy Funds, an investment management firm specializing in global money management. Brett began there as a Regional Vice –President advising RIA channels and Broker-Dealers such as Merrill Lynch and Morgan Stanley within a multi-state region. His duties evolved into a Senior Institutional Analyst position where he began working with large defined benefit clients such as Walmart and Auto Nation. Brett helped develop the infrastructure of the Institutional Marketing Department, working closely with the Chief Investment Officer to offer institutional money management services.

Brett began his financial services career at the A.G. Edwards & Sons office in Santa Barbara, California, as a college student, an investment banking and brokerage firm. Brett had undergraduate studies at both UCLA and UC-Santa Barbara, culminating with a Bachelor's Degree in English from UC-Santa Barbara.

Brett has a passion for sports and has extended his interest in golf into serving as a Board Member for 6 Degrees Golf.

For more information, visit <http://www.workplanretire.com/About>