Top Trends for 403(b) Plans in the Private K-12 Marketplace
Join us as we discuss issues related to 403(b) plans in the K-12 independent school marketplace. Topics will include: opportunities that improve and protect participant outcomes; pros and cons regarding Multiple-Employer Plans (MEPs); navigating and negotiating plan fees; and managing Fiduciary Risks.

Learning Objectives:
Participants will learn about issues related to 403(b) plans in the K-12 independent school marketplace.

Presenter: Brad L. Larsen, Managing Director - Southeastern U.S., NFP
Brad is the Managing Director of the Southeast U.S. Region for NFP. He is a leader in the Employer Sponsored Retirement Plan industry. He has 30+ years of experience as an Advisor/Consultant specializing in marketing, managing and designing qualified and non-qualified retirement plans with extensive knowledge about institutional investment planning.

His experience spans a wide range of industries including Legal, Higher-Education, Healthcare, Accounting, Manufacturing and Construction with particular emphasis on the following practice areas:

- Investment Policy Statement (IPS) Design
- Manager Searches / Fund Replacements
- RFP/Vendor Search & Selection
- Fiduciary Standards of Care
- Committee Member Fiduciary Training
- Employee Investment Advise & Financial Wellness Consulting
- Plan Merger & Acquisition Assistance
- Plan Renovations
- Retirement Plan Design Analysis

Brad spent half his career building the Sales & Marketing Divisions' of some of the most respected qualified retirement planning companies in the industry today. His prior experience includes working with firms such as Principal Financial Group, 401kExchange, Nationwide Retirement Services and RSM McGladrey Retirement Resources. Brad now puts his expertise to use for the exclusive benefit of NFP's clients.

Education:

- Bachelor of Science in Business Administration - University of Florida, Gainesville, FL
- Accredited Investment Fiduciary (AIF) - Center for Fiduciary Studies, Stetson University
- PlanSponsor Retirement Professional (PRP) - PlanSponsor.org.
- Certified 401(k) Professional (CkP) - TRAUniversity.com
- Certified Health Savings Adviser (CHSA)

Mr. Larsen is a frequent speaker and guest lecturer. Brad is also a lecturer for The Plan Sponsor University (TPSU). He has hosted, presented and served as a seminar panelist on a variety of topics including fiduciary governance, RFP/Fee Benchmarking best practices and QDIA/TDF suitability analysis.

His dedication to the retirement industry has earned Brad many industry accolades. 401kWire.com ranked him one of the "Top 300 Most Influential Advisors in Defined Contribution" in 2011. PlanAdvisor ranked Brad one of the "Top 100 Retirement Plan Advisers" in 2013 and 2015. Financial Times ranked him one of the "Top Retirement Advisers" in 2015, 2016, 2017, 2018 2019, 2020 & 2021.

Brad holds a Series 65 (NASAA-Investment Advisors Law Exam) license.
Brad has been a Florida Resident for 40+ years and currently lives in Stuart, Florida with his wife Elizabeth Metzger and three sons Erik, Colin and Matthew. He enjoys sports such as football, basketball, golf, fishing, boating and has a hobby of collecting tropical palm trees.

Field of Study: Personnel/Human Resources
Prerequisites: Basic knowledge of independent school finances
Advanced Preparation: None
Program Level: Update
Delivery Method: Group Live
Participants will earn 1 CPE credit.