

Capital Forum on Pensions 2018

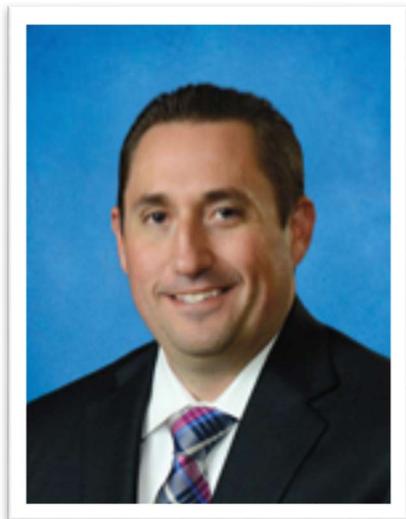
Speaker Biographies



Brian Furgala – Keynote Speaker

Brian Furgala, Esq., CPC, QPA recently joined Wolters Kluwer's ftwilliam.com team after being an ERISA attorney for over the past ten years. In his new role as the Director of ERISA Services, he manages nearly 300,000 retirement plan documents and nearly 50,000 welfare plan documents available on ftwilliam.com and monitors all legal, regulatory and procedural changes affecting those plans.

He also works with the Technical Answer Group (TAG) to provide insight into customers' complex questions around defined contribution and defined benefit plan questions. In addition, Brian hosts a series of webinars through ftwilliam.com's continuing education webinar program and continues his speaking calendar at industry associations and conferences throughout the year.



Matt Beaulieu

Matt Beaulieu is a vice president and senior defined contribution investment only wholesaler. He is responsible for DCIO sales in the Western region.

Matt began his career in the financial services industry in 1999 and joined Franklin Templeton Investments in 2009. He is an excellent source of information regarding Franklin Templeton products and services. His experience in sales and marketing offers ideas and solutions to registered securities representatives to help them build their practice and make prospecting more effective.

Matt earned his BA from Dominican University of California. He is an AIF and FINRA registered representative. Matt is married and has two boys, Jack and Lucas and resides with his wife and family in Rocklin, CA.



Scott E. Galbreath

Scott E. Galbreath, J.D., LL.M. (Tax) leads the Employee Benefits and Executive Compensation Practice Team at Murphy Austin Adams Schoenfeld, LLP. He has more than 30 years of experience representing employers in ERISA, employee benefits, and executive compensation matters.

Scott's benefits practice includes counseling for-profit, tax exempt and governmental clients on all aspects of employee benefits: choosing appropriate retirement, deferred compensation, equity compensation, cafeteria and other health and welfare benefit plans; using benefits to attract and retain key executive and management employees; using benefits (including ESOPs), in succession planning; ERISA, Internal Revenue Code section 401(a), 403(b), 409A and 457 compliance; CalPERS and PEPPRA compliance; investments, prohibited transactions, and fiduciary duties; multiemployer plan funding and withdrawal liability rules; as well as drafting plan documents and correcting plan operational or document failures, and representing clients in IRS audits or Department of Labor investigations.

Born and raised in Chicago, Scott earned his J.D. from IIT Chicago-Kent College of Law as well as an LL.M in Tax with honors from Chicago-Kent. He was recognized as an *Illinois Leading Lawyer in Employee Benefits* in 2006 by the *Leading Lawyer Network*. Scott is a former officer of the Chicago Bar Association's Employee Benefits Committee and former Chair of its Executive Compensation Subcommittee. After practicing law in Chicago for 20 years he moved to California and passed the California bar in 2008.

He is a Certified Specialist in Taxation Law by the State Bar of California Board of Legal Specialization and has been recognized by his peers on the Sacramento Magazine "Top Lawyers List" for Employee Benefits for three consecutive years. Scott serves on the Board of both the Sacramento Chapter of Western Pension & Benefits Council and the National Institute of Plan Administrators. He is a former President of the Sacramento Chapter of the Western Pension & Benefits Council and has served as a member of the Executive Committee of the Governing Board of the Western Pension & Benefits Council. Scott has also served as Chair of the Sacramento County Bar Association's Tax Section.

Scott regularly speaks at industry events on new developments in employee benefits and has had articles published in the *Journal of Pension Benefits*, *NYU Review of Employee Benefits and Executive Compensation*, and the *California Labor & Employment Review*.



Zachary Carstensen

Based in Sacramento, California, Zachary Carstensen, Senior Regional Vice President, is responsible for sales and relationship development with financial representatives and plan consultants in northern and central California for John Hancock, provider of retirement plan products and services for qualified retirement plans.

Zachary has acquired more than 16 years' experience in the financial services industry. Zachary qualified for the John Hancock Retirement Plan Services President's Club multiple times, which is awarded to Regional Vice Presidents who consistently finish in the top 15% of his peers.

Zachary served as Retirement Plans Sales Associate and Regional Marketing Director for 2 years before being promoted to Regional Vice President.

Zachary earned a Bachelor of Arts Degree from DePauw University. Zachary currently holds a Series 7, 6, and 63 licenses, and holds life/health licenses in California, Illinois, Indiana and New York.



Mike Preston

Mike is president of Preston Actuarial Services, Inc. of California. In addition to being a past president of the ASPPA College of Pension Actuaries (ACOPA), he has served as Editor-in-Chief of the ASPPA Journal (now the Plan Consultant), served for six years on ASPPA's Board of Directors, been a member of the Pension Committee of the Actuarial Standards Board for four years and has been a member of ASPPA for 30 years.

Mike is also a member of the American Academy of Actuaries and is an enrolled actuary. In addition to speaking at many ASPPA conferences, he has spoken multiple times at the Enrolled Actuaries' meeting, a number of NIPA Annual Conferences and at some of the annual meetings of various Western Pension & Benefit Conference chapters as well as for the Beverly Hills Bar Association.

Mike's firm offers full-service pension administration. Mike has served as an expert witness in quite a few ERISA related actions. He is a pension generalist, but since 1994 many of his industry presentations and much of his practice has revolved around application of the non-discrimination regulations under IRC Section 401(a)(4).

Mike also has volunteered his time to the Pension Assistance List, an American Academy of Actuaries program that serves the public by offering professional services to consumers who have questions about their pension plans and to the Harriett Buhai Center for Family Law which provides family law and domestic violence assistance to the poor.



Henry Giano

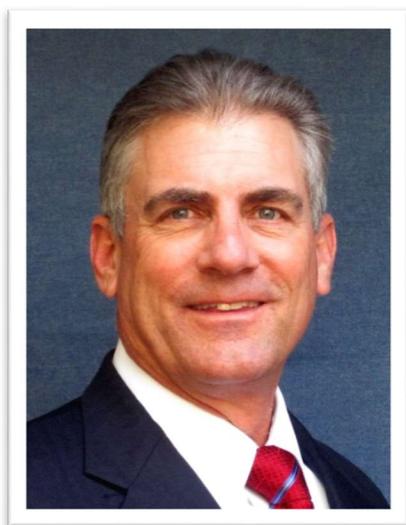
Henry joined Empower Retirement in 2013 as a regional sales director and brings over 20 years of experience to his role. Henry is responsible for developing corporate retirement plan sales in Northern California and Northern Nevada through intermediaries in the advisor, bank and TPA channels.

Henry gets great satisfaction from educating financial advisors and plan sponsors on the many ways they can help their plan participants achieve their financial goals for retirement.

Prior to Empower Retirement, Henry spent 10 years with Nationwide Financial as Regional Vice President. He has a degree in finance from California State University-Fullerton and a M.B.A. from Chapman University.

Henry holds Series 6 and 63 securities registrations and applicable life insurance licenses.

In his spare time, Henry enjoys spending time with his wife and 11 year old daughter. They love to ski and snowboard as much as possible.



Eric Sharp

Eric J. Sharp, QPFC, CRPS, AIF took over the position VP of Sales & Marketing at PenSys, Inc. in January 2012.

Eric's responsibilities include developing and marketing qualified plans to the Financial Advisor community as well as Product Partners, Platform Partners, Broker Dealers and RIA's.

His entire working career has been involved in the Qualified Plan market since entering the field in 1978. Prior to PenSys, Inc. Eric spent 13 years with Oppenheimer Funds Distributors, Inc. as the VP of Retirement Plans covering the Pacific Northwest Region. While at Oppenheimer, Eric was a two time Retirement Wholesaler of the Year.

Eric is a current member of NIPA and the East Bay FPA.

In 1978, Eric graduated from California State University at Sacramento with a Bachelor of Science Degree in Business Administration/Finance. He passed the Certified Retirement Plan Specialist (CRPS) designation in 2008, AIF in December of 2013 and QPFC in August of 2014.

Eric is a Principal in both PenSys, Inc. and Pensys Fiduciary Services, a sister company that provides 3(16) Fiduciary Services to employers.

PenSys is Headquartered in Roseville, CA and has 3,200 plans across the United States and Guam.