Target Date Funds
Brad Vaughan, T. Rowe Price
Rachael Brumund, Fidelity Investments
Rich Merson, PIMCO

Join us for a panel discussion as Brad Vaughan of T Rowe Price, Rachael Brumund of Fidelity, & Rich Merson of PIMCO guide us in a thought-provoking discussion around the current and future landscape of Target Date Funds. Our panelists will be sharing their experience of working with hundreds of advisors on TDF best practices, trends in this space and field audience questions.

Brad Vaughan is a regional sales consultant for T. Rowe Price. Prior to joining the firm in 2015, he was a divisional vice president with Voya Financial (and its legacy companies, ING Group and Aetna Financial Services) and a sales representative and regional sales manager. His responsibilities included working with advisors and financial intermediaries in the Western U.S. to support Voya's 401(k), 403(b), and 457 businesses. He managed a team of up to 15 sales professionals and 23 client relations managers. Brad earned a B.A. in economics from Washington & Lee University. He is a Series 6, 7, 63, and 65 registered representative and a Series 26 registered principal.

Rachael Brumund Vice President Fidelity Investments Rachael Brumund is a vice president at Fidelity Institutional® (FI), the Fidelity Investments business that offers financial professionals and institutions access to the investment, technology, and platform solutions they need to service their clients and grow their businesses. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals. In this role, Mrs. Brumund is a wholesaler within the Defined Contribution Investment Only (DCIO) division. She is based out of Portland, Oregon where she is responsible for the distribution of Fidelity's asset management capabilities through advisors, advisory firms, and recordkeepers that are focused on serving the small- and mid-sized defined contribution market. She supports her clients by representing Fidelity's investment capabilities, investment thought leadership, capital markets perspectives, investment analytics, and retirement thought leadership. She has been in the financial industry since 2006. Previously, Mrs. Brumund was a regional vice president with Transamerica. She has also worked for ADP and Goldman Sachs Asset Management. Mrs. Brumund earned her Bachelor of Arts degree in psychology from the University of North Carolina, Chapel Hill.

Rich Merson is a vice president and an account manager for PIMCO supporting the Pacific Northwest and Rocky Mountain regions. He was also a member of PIMCO's client management Inclusion & Diversity Council, contributing to the firm's investments in inclusion and diversity, internally and externally. Prior to joining PIMCO in 2017, he was a vice president at Legg Mason Global Asset Management, responsible for defined contribution investment-only sales in the

Pacific Northwest region. Previously, Mr. Merson was a vice president at DWS Investments, responsible for record-keeping sales in the Western U.S. He has 26 years of investment and financial services experience and is a CFP® professional.