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THE PLAN SPONSOR UNIVERSITY

Colin M. Clark, C(k)P®, AIF®, CPFA®
Senior Vice President, Retirement
Washington Financial Group, a division of HUB International Mid-Atlantic Inc.

Colin is a Senior Vice President of HUB International Mid-Atlantic, focusing on corporate and non-profit retirement plans. He has extensive experience managing assets for individuals, corporations, and pension plans including establishing and consulting on 401(k) plans, 403(b) plans, profit sharing, cash balance and executive benefit plans. Colin's day to day responsibilities include working with plan trustees on addressing their fiduciary responsibilities and working with individuals on managing their retirement accounts.

Colin is a proud member of the team at Washington Financial Group that was named a 2021 PLANADVISER Top 100 Retirement Plan Advisor[1], a 2021 NAPA Top DC Advisor Team[2] as well as the 2017 PLANSPONSOR Retirement Plan Adviser Small Team of the Year[3]. The 2017 PLANSPONSOR Retirement Plan Adviser of the Year winners have demonstrated leadership and a commitment to excellence for their retirement plan sponsor clients and participants.

Colin was recently named to the 2020 Financial Times Top 401 Retirement Plan Advisors[4] list. He is also a board member of the Retirement Advisor Council, a national organization that advocates for successful qualified plan and participant retirement outcomes through the collaborative efforts of experienced, qualified retirement plan advisors, investment managers and defined contribution plan service providers.

Colin is married, and he and his wife have four children. He enjoys coaching football and soccer as well as playing in local USTA tennis leagues.

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[1]The PLANADVISER Top 100 Retirement Plan Advisers list is compiled from responses to the PLANADVISER Retirement Plan Adviser Survey. The list is drawn solely from a set of quantitative variables and information in the survey supplied by the advisers themselves. For an adviser to be eligible for recognition in this year's Top 100, they had to submit a completed entry to the Retirement Plan Adviser Survey. A sub-segment of the questions was used to determine eligibility for the Top 100. This award does not evaluate the quality of services provided to clients and is not indicative of future performance. Neither the advisors nor their parent firms pay a fee to PLANADVISER in exchange for inclusion in the Top 100.

[2]To be considered a 2021 NAPA Top DC Advisor Team, advisers had to submit an application form to NAPA-Net. The list focuses on investment advisory teams, rather than individual investment advisers, and on the defined contribution practice specifically. Teams are ranked based on Assets under Advisement (as of 12/31/2020). The complete list can be found here: https://www.napa-net.org/industry-intel/industry-lists/top-dc-advisor-teams-2020.

[3]The PLANSPONSOR Retirement Plan Adviser of the Year includes winners across four categories: individual, small team, large team and mega team. Judges look for advisory practices that employ industry best practices across a number of areas, including the implementation of auto enrollment, auto escalation and re-enrollment, especially at higher levels than the industry norms. Advisers that are successful in the award program need to demonstrate a commitment to outcomes-based measurement and encourage plan sponsor clients to create plans not that are just in the best interest of the company but are in the best interest of participants. This award does not evaluate the quality of services provided to clients and is not indicative of future performance. Neither the advisors nor their parent firms pay a fee to PLANSPONSOR in exchange for the Retirement Plan Adviser of the Year award.

[4]The Financial Times 401 Top Retirement Advisors is an independent listing produced annually by Ignites Research, a division of Money-Media, Inc., on behalf of the Financial Times (October 2020). The FT 401 is based on data gathered from advisors, regulatory disclosures, and the FT's research. The listing reflects each advisor's status in six primary areas: DC plan assets under advisement (AUA), DC AUA growth rate, specialization in DC plans, years of experience, advanced industry credentials and compliance record. A total of 855 advisors applied for the award, of which 401 were selected (47%). This award is not indicative of the advisor's future performance. Neither the advisors nor their parent firms pay a fee to the Financial Times in exchange for inclusion in the FT 401.