



Mark Tonelli, AIF®
Senior Vice President
HUB International

Mark Tonelli is focused on delivering retirement solutions that are meaningful and relevant to plan sponsors and their participants. Employers sponsoring a retirement plan seek Mark's expertise with developing a sound governance process, implementing best practice fiduciary processes, providing unique access to education, promoting disciplined savings opportunities, and offering a robust benefit to employees. Clients rely on Mark as a trusted advisor who puts the interest of his clients first and to share his knowledge and experience to address challenges.

With more than 25 years of industry experience, Mark is well versed in serving the retirement needs of investment committees and plan sponsors. He spent 16 years working at Fidelity Investments followed by his starting a practice which was eventually bought by HUB International in 2018. He earned the Accredited Investment Fiduciary (AIF®) designation which demonstrates his commitment to partnering with plan sponsors to implement prudent processes and policies within their retirement plans, and as a leader in his field, he is often asked to share his insights and perspective on various panels, advisory boards and committees.

He received his B.S. in Entrepreneurial and Small Business Operations from Northeastern University and attended Northwestern University's Kellogg School of Management. Mark holds FINRA Series 6, 7, and 63 securities registrations through LPL Financial, the Series 66 through LPL Financial and Sheridan Road Advisors, as well as a health and life insurance license. Mark has also been named one of the top 401 Retirement Plan Advisors by the Financial Times in 2016 and 2018, as well as one of the top 100 Retirement Plan Advisors by PLANADVISOR in 2016, 2017, and 2019.

Mark enjoys spending his free time with his family and friends and if that includes skiing in the winter and golfing in the summer, even better!



Matt Sommer, PhD, CFA, CFP®
Head of Specialist Consulting Group
Janus Henderson Investors

Matt Sommer is Head of Specialist Consulting Group at Janus Henderson Investors. His team consists of various subject matter experts across several disciplines including retirement planning, wealth advisory, practice management, and investment strategies. They provide clients actionable insight and expertise they can implement into their business practice to retain and gain clients. Before assuming his current role in 2023, Matt was head of the firm's defined contribution and wealth advisor services team and lead behavioral finance researcher and wealth strategist. Prior to joining Janus in 2010, Matt spent 17 years at Morgan Stanley Wealth Management and its predecessors, Citi Global Wealth Management and Smith Barney, during which time his roles included director of financial planning and director of retirement planning.

Matt received his bachelor's degree in finance from the University of Rhode Island and an MBA with a concentration in finance from Pace University, Lubin School of Business. He received a doctorate degree (dissertation: Three Essays Investigating the Bequest Intentions and Expectations of Older Adults) from Kansas State University. His doctoral candidacy research was selected for publication in the Journal of Financial Planning and the Journal of Personal Finance. Matt is a frequent guest on CNBC and Bloomberg TV, a regular contributor to Kiplinger's Building Wealth column and has been extensively quoted in various industry publications including the Wall Street Journal, Barron's, and Investment News. He has 31 years of financial industry experience.