Shir McGettigan, FSCP®, AIF®, CPFA®, C(K)P®, NQPA™
Director of Employer-Sponsored Retirement Plans
BLS Wealth Management, a HUB International Company

Shir Keidan McGettigan is a Certified 401(k) Professional and Director of Employer-Sponsored Plans at BLS Wealth Management, a Hub International company. Shir's listening skills, ability to gain client trust, and expertise in the complexities of 401(k) and 403(b)plans which set her apart. Shir helps businesses strategically design plans which are tailored to the company's specific needs and wants, while maintaining the regulations from the Department of Labor (DOL) and Internal Revenue Service (IRS). "It's not just about the onboarding process but also managing the relationships on a continuous basis," she explains. Shir serves as an ongoing resource, helping ensure fees are appropriate, investment options are competitive, and monitoring the success of the plan while striving to help plan sponsors make sure it is compliant with both the DOL and the IRS.

In addition to helping businesses design quality 401(k) and 403(b) plans and assisting with the management of client relationships for corporate retirement plans, Shir is committed to providing personalized service and education to the company's employees for their overall financial health. It's this customized approach that fuels her success. Her hands-on approach is a benefit to both the employer and the employee. With direct phone and email access to Shir and her team, as well as regularly scheduled on-site meetings, Shir strives to make both the employer and employees feel connected and confident. In 2021, Shir was recognized by the National Association of Plan Advisors and rewarded both Top Woman Advisor: Rising Stars 2021 * and Top 100 Retirement Plan Advisors Under 40. **

*Established in 2015, nominations from the list were provided by napa broker-dealer/RIA firm partners. nominees had to be women, had to be retirement plan advisors with their own book of business. nominees were required to submit responses to an application comprised of a series of quantitative and qualitative questions about their experience, size and composition of their practice, awards and recognitions, and industry contributions, which were then reviewed by a panel of senior advisor industry experts, who, based on those criteria, and following a broker-check review, selected the top women advisors. within the group of top women advisors, those who were principals, owners or team captains of their organizations were designated as "captains." the list is created and conducted by the national association of plan advisors, an affiliate organization of the American retirement association, a non-profit association. No fee is charged to participate. the rating is not indicative of the nominee's future performance. in 2021, 500 nominations were received, 273 applications, from which 51 captains, 50 all-stars and 33 rising stars were chosen.

**Established in 2014, this list - officially the napa top retirement plan advisors under 40, a.k.a. "aces" - is based on applications received from nominees designated by napa broker-dealer/RIA firm partners. those applications are then vetted by a blue-ribbon panel of senior advisor industry experts based on a combination of quantitative and qualitative data submitted by the nominees, as well as a broker-check review. these "aces" are widely seen as the future leaders of the retirement plan advisor industry. No fee is charged to participate. the rating is not indicative of the nominee's future performance. in 2021, 501 nominations were received, 258 applications, and 100 were selected.

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