TPSU THE PLAN SPONSOR UNIVERSITY

J. Andy Ingram, AIF®, QPFC®, CPFA™, Ri(k)™

Qualified Plan Fiduciary, Lifestyle Investment Advisor

Capital Investment Company of Virginia & Sollinda Capital Management

J. Andy Ingram is a nationally recognized retirement plan advisor with a mission to simplify complex financial decisions and deliver retirement strategies that work—for both employers and employees. As Founder of Capital Investment Company of Virginia and a strategic partner of Sollinda Capital Management, Andy brings a fiduciary-first mindset, deep technical knowledge, and a client-centered approach to every engagement. He also serves as a featured faculty member with The Plan Sponsor University (TPSU), educating employers across the country on best practices in plan design and fiduciary governance.

Credentials & Designations

Andy holds some of the retirement industry's most respected credentials:

- AIF® – Accredited Investment Fiduciary
- QPFC® – Qualified Plan Financial Consultant
- CPFA™ – Certified Plan Fiduciary Advisor
- Ri(k)™ – Retirement Income(k) Specialist

These designations affirm his specialized expertise in ERISA compliance, plan benchmarking, investment oversight, and participant outcomes.

Core Specialties

- 401(k)/403(b) Plan Consulting & 3(38) Fiduciary Management
- Plan Design Optimization & Cost Benchmarking
- Participant Education & Retirement Readiness Programs
- Wealth & Lifestyle Planning for Business Owners & Executives
- Tax-Advantaged Strategies, Including Roth Conversions & NUA Planning
- Succession, Estate, and Multigenerational Wealth Planning

Advisory Philosophy

Andy believes that every retirement plan and investment strategy should begin with listening. His planning process focuses on personalization, transparency, and performance, backed by research-driven strategies and open-architecture platforms. As an independent advisor, Andy avoids cookie-cutter solutions—offering instead a tailored experience that prioritizes your long-term success.

Why Andy?

With over a decade of experience and a reputation for leadership in the retirement space, Andy Ingram delivers strategies that are technically sound, cost-efficient, and deeply human. He brings expertise in Roth strategies, tax planning, and market resilience—paired with a client-first mindset that resonates with HR leaders, CFOs, business owners, and individual investors alike. Whether you're building a 401(k) plan, enhancing fiduciary oversight, or seeking personalized retirement advice, Andy provides a clear, confident path forward.

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Jonathan Young, PPC®
Senior Vice President,
Senior National
Accounts Manager

As Capital Group's speaker on all things retirement, Jonathan Young believes six of the most powerful words in the English language are: Let me tell you a story. He weaves humor, statistics and insights drawn from over 30 years of experience to coach financial professionals to retirement plan success.

Jonathan inspires everyone he meets with his passion for the noble quest of improving participant outcomes. His mission is to show the vital role we can play as champions of dignified retirements for upcoming generations of Americans.

This former financial advisor knows the value advisors deliver to clients each day and always looks for ways advisors can take their practices to the next level. His decades of investment industry experience include over 28 years at Capital Group as well as time spent at PaineWebber. He holds a bachelor's degree in Speech Communication and Rhetoric from Old Dominion University, as well as the Accredited Investment Fiduciary®, Qualified Plan Consultant® and Professional Plan Consultant® designations.

This Virginia native can be spotted in his natural habitat of Chesapeake, VA, where he's known to indulge in his passions for classic muscle cars, classic vinyl, barbeque grillery and saltwater fishing.

"In my 20-plus years of attending wealth management and retirement plan conferences, I've heard many people speak. Few – if any – deliver the energy, knowledge and entertainment like Jonathan. He's equal parts subject matter expert, master storyteller and comic. Your brain and practice will benefit from attending his session(s)."

- Advisor of 20+ years

"Jonathan cuts through the noise and delivers content that's relevant and meaningful. With wit and warmth, he creates an atmosphere that excites and engages the listeners."

- Advisor of 30+ years