TPSU
THE PLAN SPONSOR UNIVERSITY

Steven W Glasgow, CFA, CIMA®, AIF®, CPFA®, CEPA®
Managing Director
HUB Retirement and Wealth Management

Steven brings more than 30 years of experience working with institutional investors including defined contribution plans, defined benefit plans, endowment and foundations, as well as corporate cash mandates.

Steven has been recognized by PLANADVISER magazine as one of the nation's "Top 100 Retirement Plan Advisors" for multiple years (most recently 2024) and was named to the *Financial Times "*Top 401" Retirement Plan Advisor List every year since its inception. His team has been named to the National Association of Plan Advisors "Top Advisor Teams" in the nation every year since inception (latest 2024). Steven was listed as a finalist for "Advisor of the Year" by PlanSponsor™ magazine in 2013 and 2017. He was also recognized as one of the Top 5 advisors nationally for the large plan market by *401k wire* in 2013. His team is currently listed as a Forbes "Best in State" wealth management team (2024 and 2025).

Steven received his bachelor's degree in finance from Auburn University and his MBA from the Crummer School of Business at Rollins College. He is a Chartered Financial Analyst (CFA) and Certified Investment Management Analyst (CIMA) designee. He holds the Accredited Investment fiduciary (AIF®) credential, has also received the Certified Behavioral Finance Analyst (CBFA) designation from the Allianz Center for Behavioral Studies and has also earned the CPFA (Certified Plan Fiduciary Advisor) designation through the National Association of Plan Advisors. In 2022 steven received the CEPA designation (Certified Exit Planning Advisor) to help his business owner clients navigate value creation and prepare for the potential of future liquidity and estate planning events. He is currently a member of the Retirement Advisor Council as well as the Viking Cove Advisor Alliance, which are invitation only organizations dedicated to enhancing the retirement plan industry and participant experiences. Steven is currently an editorial advisory board member for "Real Assets Advisor" magazine and is president of the recently launched Nashville Chapter of the Exit Planning Institute.

Biography

Sue Walton

Sue Walton is a senior retirement strategist at Capital Group, home of American Funds. She has 27 years of industry experience and has been with Capital Group for nine years. Prior to joining Capital, Sue was a director at Towers Watson Investment Services. Before that, she was an investment consultant at Mercer Investment Consulting and Ellwood Associates. She holds an MBA from DePaul University with a concentration in finance and a bachelor’s degree in business administration, economics and international business from Marquette University. Sue is based in Chicago.