Shir Keidan McGettigan, FSCP®, AIF®, CPFA®, C(K)P®, NQPC™
Director of Employer-Sponsored Retirement Plans
HUB Retirement and Wealth Management

Shir Keidan McGettigan is a Certified 401(k) Professional and Director of Employer-Sponsored Plans at HUB Retirement and Wealth Management. Shir's listening skills, ability to gain client trust, and expertise in the complexities of 401(k) and 403(b) plans 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.

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 2024, Shir was recognized by the National Association of Plan Advisors and rewarded both Top Woman Advisor * and in 2025 for Top Young Advisors. **

*NAPA 2024 WOMEN OF EXCELLENCE: NOMINEES WERE ASKED TO RESPOND TO A SERIES OF QUANTITATIVE AND QUALITATIVE QUESTIONS ABOUT THEIR EXPERIENCE AND PRACTICE. THOSE ANONYMIZED QUESTIONNAIRES WERE THEN REVIEWED BY A BLUE-RIBBON PANEL OF JUDGES WHO, OVER THE COURSE OF SEVERAL WEEKS, SELECTED THE WOMEN HONORED IN THREE CATEGORIES: • CAPTAINS: FOCUSED ON GROWTH OF THE ORGANIZATION AND BUSINESS. THEY ARE PRINCIPALS, LEADERS, OWNERS AND PRODUCING ADVISORS. • MVPS: NON-PRODUCING (POSSIBLY) LICENSED RELATIONSHIP MANAGERS PRIMARILY FOCUSED ON MANAGING RELATIONSHIPS AND THE RETENTION OF CLIENTS. • RISING STARS: THEY HAVE LESS THAN FIVE YEARS IN THE BUSINESS AND ARE EITHER EMERGING TEAM LEADERS OR NEW PRODUCERS.FOR 2024, THERE WERE 767 NOMINATIONS, 358 APPLICATIONS AND 245 NAMED TO THE FINAL RANKING. NO FEE IS CHARGED TO PARTICIPATE. THE RATING IS NOT INDICATIVE OF THE ADVISOR'S FUTURE PERFORMANCE."

**ESTABLISHED IN 2014, THE LIST OF "ACES" IS DRAWN FROM NOMINATIONS PROVIDED BY NAPA BROKER-DEALER/RIA FIRM PARTNERS AND 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. ONE OF THE FIRST OF NAPA'S STANDARD-SETTING INDUSTRY LISTS, MANY OF THE INDIVIDUALS WHO HAVE BEEN RECOGNIZED HERE HAVE GONE ON TO BECOME THE VERY INDUSTRY LEADERS THIS RECOGNITION WAS DESIGNED TO HELP IDENTIFY. THE AWARD IS NOT INDICATIVE OF THE ADVISOR'S FUTURE PERFORMANCE. NO FEE IS CHARGED TO PARTICIPATE. IN 2025, 662 NOMINATIONS WERE RECEIVED AND FROM THAT, 214 COMPLETED THE APPLICATION. 100 WERE ULTIMATELY SELECTED.

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