



**Tom Leverone, CPFA<sup>®</sup>, C(k)P<sup>®</sup>, ChFC<sup>®</sup>, CLTC<sup>®</sup>**  
*Senior Vice President*  
**Washington Financial Group, a division of HUB  
International Mid-Atlantic Inc.**

Tom is a Senior Vice President at HUB Retirement and Wealth Management (formerly Washington Financial Group), specializing in the retirement plan market assisting with setting up and managing 401(k) plans. Tom works with companies and individuals to determine their needs and provide appropriate financial strategies.

In the 401(k) field, Tom works with employers to set up and manage retirement plans that help participants prepare for retirement. He works with companies to develop strong employee education programs including onsite workshops and face-to-face meetings. Tom also works with employers to help them understand and address their fiduciary responsibilities. His team of professionals work together to help clients manage the most appropriate, cost-effective retirement plan. Tom also leads interactive discussions and break-out sessions during The Plan Sponsor University (TPSU) programs in the Washington, DC Metro area.

Tom is a proud member of the team that was named a 2021 PLANADVISER Top 100 Retirement Plan Advisor, a 2022 NAPA Top DC Advisor Team as well as the 2017 PLANSPONSOR Retirement Plan Adviser Small Team of the Year. The 2017 PLANSPONSOR Retirement Plan Adviser of the Year winners have demonstrated leadership and a commitment to excellence for their retirement plan sponsor clients and participants.

Tom is an active volunteer in the Vienna community coaching a variety of sports teams. He is married and has four children.

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<sup>1</sup>The PLANADVISER Top 100 Retirement Plan Advisers list is compiled from responses to the PLANADVISER Retirement Plan Adviser Survey. The list is drawn solely from a set of quantitative variables and information in the survey supplied by the advisers themselves. For an adviser to be eligible for recognition in this year's Top 100, they had to submit a completed entry to the Retirement Plan Adviser Survey. A sub-segment of the questions was used to determine eligibility for the Top 100. This award does not evaluate the quality of services provided to clients and is not indicative of future performance. Neither the advisers nor their parent firms pay a fee to PLANADVISER in exchange for inclusion in the Top 100.

<sup>2</sup>To be considered a 2021 NAPA Top DC Advisor Team, advisers had to submit an application form to NAPA-Net. The list focuses on investment advisory teams, rather than individual investment advisers, and on the defined contribution practice specifically. Teams are ranked based on Assets under Advisement (as of 12/31/2020). The complete list can be found here: <https://www.napa-net.org/industry-intel/industry-lists/top-dc-advisor-teams-2020>.

<sup>3</sup>The PLANSPONSOR Retirement Plan Adviser of the Year includes winners across four categories: individual, small team, large team and mega team. Judges look for advisory practices that employ industry best practices across a number of areas, including the implementation of auto enrollment, auto escalation and re-enrollment, especially at higher levels than the industry norms. Advisers that are successful in the award program need to demonstrate a commitment to outcomes-based measurement and encourage plan sponsor clients to create plans not that are just in the best interest of the company but are in the best interest of participants. This award does not evaluate the quality of services provided to clients and is not indicative of future performance. Neither the advisers nor their parent firms pay a fee to PLANSPONSOR in exchange for the Retirement Plan Adviser of the Year award.



**Colin M. Clark, C(k)P®, AIF®, CPFA®**  
*Senior Vice President, Retirement*  
**Washington Financial Group, a division of HUB  
International Mid-Atlantic Inc.**

Colin is a Senior Vice President at HUB Retirement and Wealth Management (formerly Washington Financial Group), focusing on corporate and non-profit retirement plans. He has extensive experience managing assets for individuals, corporations, and pension plans including establishing and consulting on 401(k) plans, 403(b) plans, profit sharing, cash balance and executive benefit plans. Colin's day to day responsibilities include working with plan trustees on addressing their fiduciary responsibilities and working with individuals on managing their retirement accounts.

Colin is a proud member of the team that was named a 2024 NAPA Top DC Advisor Team. He is also a board member of the Retirement Advisor Council, a national organization that advocates for successful qualified plan and participant retirement outcomes through the collaborative efforts of experienced, qualified retirement plan advisors, investment managers and defined contribution plan service providers.

Colin has four children, is the office grill master, enjoys coaching football and soccer as well as playing in local USTA tennis leagues



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## **John Doyle**

John Doyle is a senior retirement strategist at Capital Group, home of American Funds. He has 37 years of investment industry experience and has been with Capital Group for 10 years. Prior to joining Capital, John was a senior consultant with The BridgePoint Group, where he developed retirement plan product and service strategies. He also was executive vice president and chief marketing officer for Hartford Investment Management Company. Before that, he worked as head of marketing and product at T. Rowe Price Retirement Plan Services and as a vice president of marketing at Fidelity Investments. He holds an MBA from the F.W. Olin Graduate School of Business at Babson College and a bachelor's degree in economics from Georgetown University. John is based in Baltimore.