Alicia Malcolm, CRPC®, CRPS®
SVP, Senior Retirement Plan Consultant
UBS Financial Services

Alicia Malcolm began her career in the financial services industry in 2010. Based in Buffalo, NY, Alicia is a Senior Vice President at UBS Financial Services and a partner on The D'Aiutolo Malcolm & Associates Investment Consulting Group. Their group currently provides services to over 100 ERISA clients representing 60,000 working Americans and holds greater than $6 billion in Retirement Plan Assets across 13 states. Alicia is currently the President of the National Association of Plan Advisors (NAPA) and serves on UBS’s Financial Advisor Advisory Council.

Alicia graduated from The University at Buffalo with a Bachelor Degree of Science in Finance and Marketing, with a minor in Economics. Alicia has been recognized Nationally throughout her career being recognized as Forbes Best-in-State Wealth Advisors (2022-2026), Forbes Best-in-State Wealth Management Teams (2025-2026), Forbes Top Women Wealth Advisors Best-in-State (2020-2026), NAPA Top DC Advisor Teams (2021-2026), NAPA Top Women Advisors (2016-2025), and PLANADVISER Top Retirement Plan Advisors (2018-2026). She and her husband, John, have two English Labradors, Charlie and Jack, and one cat, Bob Scott. She enjoys almost any activity that takes her outdoors, including golf, running, hiking, biking and swimming.

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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 35 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 33 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.

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