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), 403(b), and nonqualified 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 retirement plans and assisting with the management of client relationships, 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. Shir continues to be recognized by the National Association of Plan Advisors and in 2024 was awarded a Top Woman Advisor and in 2025 and 2026 a Top Young Advisor. Shir's retirement plan team at HUB South Florida was also awarded as a top DC team in 2026.

NAPA 2024 Women of Excellence: Established in 2015, nominations from the list were provided by NAPA Broker-Dealer/RIA Firm Partners. Nominees had to be women, had to be retirement plan advisors with their own book of business. Nominees were required to submit responses to an application comprised of a series of quantitative and qualitative questions about their experience, size and composition of their practice, awards and recognitions, and industry contributions, which were then reviewed by a panel of senior advisor industry experts, who, based on those criteria, and following a broker-check review, selected the top women advisors. The award is not indicative of the Advisor's future performance. No fee is charged to participate. This award was published in October 2024. The award is based on information from May – August of 2024.

2025 – Top Young Plan Advisors "Aces". 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.
This award was announced on November 15, 2025, and reflects data from May - August of 2025.

2026 – Top Young Plan Advisors "Aces" - 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. This award was announced on November 14, 2026, and reflects data from May - August of 2026.

2026 NAPA Top DC Advisor Teams - Established in 2017, nominees had to be individual advisor team/offices with a defined contribution book of business, in a single physical location. To be considered, firms had to submit responses to an application form, including information about their practices, notably their defined contribution (DC) assets under advisement. Teams must have at least $100 million in AUA to be included. The list is based exclusively on self-reported AUA. The list is created and conducted by the National Association of Plan Advisors, an affiliate organization of the American Retirement Association, a non-profit association. No fee is charged to participate. The rating is not indicative of the nominee's future performance. This award was announced on March 18, 2026, and reflects data from January - March of 2026.

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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