



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.

A decorative graphic consisting of several overlapping wavy bands in various shades of blue, ranging from a deep navy to a bright cyan, creating a sense of movement and depth.

Steve Chappell, AIF®

AVP, Retirement Plan Sales

The Standard

Steve Chappell has more than 20 years of experience in financial services, focused on retirement plans. He manages national distribution relationships with advisor firms and third-party administrators and leads distribution strategy for Pooled Employer Plans and Advisor Managed Accounts. Chappell holds FINRA Series 7, 66 and 24 securities licenses and Accredited Investment Fiduciary® and Retirement Plan Associate designations. He graduated with a Bachelor of Arts degree from the University of Minnesota.