Tom Leverone, CPFA®, C(k)P®, ChFC®, CLTC®
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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[1]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 advisors nor their parent firms pay a fee to PLANADVISER in exchange for inclusion in the Top 100.

[2]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.

[3]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 advisors nor their parent firms pay a fee to PLANSPONSOR in exchange for the Retirement Plan Adviser of the Year award.

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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 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