



## AMERICAN TRUST RETIREMENT: SPEAKER PROFILE



**Adam Sokolic**  
**Chief Operating Officer**  
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**HUB International**

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Adam is Chief Operating Officer, Retirement & Private Wealth for HUB International. He has spent the last 20+ years leading both small and large organizations through transformative product & platform development.

Prior to joining HUB International, Adam was the COO and a Founding Partner of the Wise Rhino Group where he focused on the operational aspects of mergers and acquisitions for retirement plan consultants and the surrounding eco system. This was after leaving American Century Investments, where he served as Senior Vice President of Retirement and Head of Client Marketing and was a senior member of the Americas Distribution Team where he lead retirement strategy and client marketing.

Adam has a long history of delivering unique product and platforms that have changed the way his clients interact with their customers.

As the Senior Vice President of Retirement Partners for LPL Financial, Mr. Sokolic lead the creation and day to day management of the LPL Financial Worksite Solutions program. Worksite Financial Solutions is a suite of services specifically developed to address the financial wellness of employees and assist them in their effort to create confidence in their financial lives.

Prior to joining LPL Financial, Mr. Sokolic was Senior Vice President of Operations for National Retirement Partners. In that role, he led all operational functions at the firm including the development of NRPs integrated tool suite platform.

Adam is a recognized industry leader on the topics of technology, marketing and data and often can be found speaking at industry conferences and writing on these topics. Themes/areas

Mr. Sokolic holds a Bachelor of Science degree in Accounting from the Pennsylvania State University. He also holds the NASD Series 7, Series 6 and Series 63 licenses along with the AIF® and PPC® designations.



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