



J. Andy Ingram, AIF®, QPFC®, CPFA™, C(k)P®, Ri(k)™
Qualified Plan Fiduciary, Lifestyle Investment Advisor
**Capital Investment Company of Virginia &
Sollinda Capital Management**

J. Andy Ingram is a nationally recognized retirement plan advisor with a mission to simplify complex financial decisions and deliver retirement strategies that work—for both employers and employees. As Founder of Capital Investment Company of Virginia and a strategic partner of Sollinda

Capital Management, Andy brings a fiduciary-first mindset, deep technical knowledge, and a client-centered approach to every engagement. He also serves as a featured faculty member with The Plan Sponsor University (TPSU), educating employers across the country on best practices in plan design and fiduciary governance.

Credentials & Designations

Andy holds some of the retirement industry's most respected credentials:

- AIF® – Accredited Investment Fiduciary
- QPFC® – Qualified Plan Financial Consultant
- CPFA™ – Certified Plan Fiduciary Advisor
- C(k)P® -- Certified 401(k) Professional
- Ri(k)™ – Retirement Income(k) Specialist

These designations affirm his specialized expertise in ERISA compliance, plan benchmarking, investment oversight, and participant outcomes.

Core Specialties

- 401(k)/403(b) Plan Consulting & 3(38) Fiduciary Management
- Plan Design Optimization & Cost Benchmarking
- Participant Education & Retirement Readiness Programs
- Wealth & Lifestyle Planning for Business Owners & Executives
- Tax-Advantaged Strategies, Including Roth Conversions & NUA Planning
- Succession, Estate, and Multigenerational Wealth Planning

Advisory Philosophy

Andy believes that every retirement plan and investment strategy should begin with listening. His planning process focuses on personalization, transparency, and performance, backed by research-driven strategies and open-architecture platforms. As an independent advisor, Andy avoids cookie-cutter solutions—offering instead a tailored experience that prioritizes your long-term success.

Why Andy?

With over a decade of experience and a reputation for leadership in the retirement space, Andy Ingram delivers strategies that are technically sound, cost-efficient, and deeply human. He brings expertise in Roth strategies, tax planning, and market resilience—paired with a client-first mindset that resonates with HR leaders, CFOs, business owners, and individual investors alike. Whether you're building a 401(k) plan, enhancing fiduciary oversight, or seeking personalized retirement advice, Andy provides a clear, confident path forward.