



JONATHAN R. OSBORNE, QKA

Daily 401(k) Operations Senior Manager

D 205.460.3988 | F 205.979.6313

600 University Park Place, Suite 501 | Birmingham, AL 35209

Jonathan.Osborne@WAasset.com

Jonathan Osborne has more than nine years of experience working in the retirement plan industry. He serves as the Daily 401(k) Operations Senior Manager for Warren Averett Asset Management. Jonathan's primary responsibilities include working to ensure retirement plan compliance and consulting on plan design.

Professional Affiliations

- Member of ASPPA

Community Involvement

- Shades Mountain Baptist Church, Deacon

Ask Me About

- Recently enacted legislation impacting corporate retirement plans
- The full range of services that Warren Averett can offer to help your business
- The importance of offering a solid retirement plan for your business
- How I met my wife when we were eight years old
- What it's like raising triplets
- When Tim Tebow sang "Sweet Home Alabama" in my dorm room in Tuscaloosa

SOLID
RELATIONSHIPS

Designations and Certifications

Qualified 401(k) Administrator

Areas of Special Emphasis

[Corporate Retirement Plans](#)

Education

Bachelor of Science in Commerce and Business Administration
University of Alabama, Tuscaloosa, AL

Master of Business Administration
University of Alabama at Birmingham,
Birmingham, AL