



Jonathan Guerrero

Financial Advisor

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Focused on what matters to you

Getting your finances in order isn't always easy or clear. That's why I'm here to provide the expertise and support you need. Whether you're just starting out or preparing for a meaningful retirement, you deserve personalized financial guidance driven by what's important to you.

Together, we'll assess your financial picture and explore how you can:

- Help strengthen your financial position.
- Build emergency savings and manage debt.
- Protect your financial future.
- Prepare for an unexpected illness, injury or loss.
- Care for your family after you're gone.
- Plan for extended care expenses.
- Invest with purpose and manage your assets.
- Explore more tax-efficient ways to manage your money.*
- Save and prepare for income in retirement.
- Pay for college or education expenses.
- Build lifelong income.
- Give to causes that matter to you.
- Plan to pass on a meaningful legacy.
- Make a difference, locally or globally.

Education and experience

- FINRA Series 63 Uniform Securities Agent State Law Exam.
- FINRA Series 7 General Securities Representative.
- FINRA Series 65 Uniform Investment Advisor.
- Life & Health Insurance License in All 50 States.
- Bachelor's degree in Accounting & Finance from Stevenson University.

[Schedule an appointment](#)

Personal profile

- Member of Bridgeway Community Church
- Former Male Initiative of Leadership and Excellence (M.I.L.E) Member at Stevenson University
- Enjoy reading, going to sporting events, and spending time with family
- Huge Baltimore Ravens and Baltimore Orioles fan

Giving back

I support the following charities and causes:

- Active Minds
- Young Men United
- WaterAid
- Habitat for Humanity

Thrivent and its financial advisors and professionals do not provide legal, accounting or tax advice. Consult your attorney or tax professional.

The Virtual Advice Team is a team of licensed financial advisors and professionals available to assist you during designated business hours. Our team offers a full variety of products and services. If you prefer to meet with a local financial advisor or professional, our team can connect you with someone in your area. Whether you work with the Virtual Advice Team, or with a local Thrivent financial advisor or professional, there will generally be no difference in the fees and expenses you will incur.

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Thrivent provides advice and guidance through its Financial Planning Framework that generally includes a review and analysis of a client's financial situation. A client may choose to further their planning engagement with Thrivent through its Dedicated Planning Services (an investment advisory service) that results in written recommendations for a fee.