



Brady Berg

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Virtual Advice Team

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I chose this career path because I've always enjoyed analyzing economics and helping people. I specialize in rollovers and retirement planning. Whether you just turned 18 or retirement is rapidly approaching, it's important to put a plan in place.

Each client has individual needs, and no cookie-cutter strategy works for everyone. I dedicate myself to understanding and appreciating each client's unique situation before providing any solutions. I believe in education, developing a viable strategy, and implementing the proper steps to achieve those goals. When not working with clients, I love going on adventures with my wife, Cally, son, Harvey (3), and our Yorkie, Tootsie. I also enjoy golfing and working out.

[Schedule an appointment](#)

Education and Experience

- FINRA Series 63 Uniform Securities Agent State Law Exam.
- FINRA Series 6 Investment Company/Variable Products Limited Representative.
- Life & Health Insurance License in all 50 states.

Specializations

I specialize in the following:

- Investments
- Retirement accumulation
- Retirement planning
- Retirement income planning
- Education funding strategies
- Life insurance

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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