



Jim Smith, FIC, RICP®

Financial Advisor

Virtual Advice Team

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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.
- Build lifelong income.
- Give to causes that matter to you.
- Plan to pass on a meaningful legacy.

Professional highlights

- Member— National Association of Fraternal Insurance Counselors.
- RICP® (Retirement Income Certified Professional®), a designation granted by the American College, Bryn Mawr, PA.
- FIC (Fraternal Insurance Counselor), a designation granted by the Fraternal Field Managers' Association.

Education and experience

- FINRA Series 7 General Securities Representative.
- FINRA Series 66 Uniform Combined State Law.
- Life & Health Insurance License in All 50.
- Joined Thrivent in 2004

Personal profile

- Married to Stacy.
- Two children & two grandchildren.
- Member of St Paul Lutheran Church.
- Enjoy cruises, traveling, surfing and golfing.
- Spending time with family and friends.

Giving back

I support the following charities and causes:

- Habitat for Humanity
- Pet Adoption Fund
- German Shepherd Rescue of Orange County

[Schedule an appointment](#)

Thrivent and its financial 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.

Thrivent is the marketing name for Thrivent Financial for Lutherans. Insurance products issued by Thrivent. Not available in all states. Securities and investment advisory services offered through Thrivent Investment Management Inc., a registered investment adviser, member FINRA and SIPC, and a subsidiary of Thrivent. Licensed agent/producer of Thrivent. Registered representative of Thrivent Investment Management Inc. Advisory services available through investment adviser representatives only. Thrivent.com/disclosures.

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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.