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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:

- Invest with purpose and manage your assets.
- Explore more tax-efficient ways to manage your money.\*
- Make a difference, locally or globally.

## **Education and experience**

- FINRA Series 63 Uniform Securities Agent State Law Exam.
- FINRA Series 6 Investment Company/Variable Products Limited Representative.
- FINRA Series 7 General Securities Representative.
- Life & Health Insurance License in All 50 States.

Schedule an appointment

## Personal profile

- Individualized Wealth Management Coursework: CFP- Advance CAP-Charitable Moody Bible Institute
- B.A. Valparaiso University
- Married to David, Children Alida, David, and Zenith
- Tiger Mom/Soccer Mom: Kumon, 19 Sports, Parks & Rec
- Chicago Marathon, Half Marathon, Pickleball, Tennis, Golf, Varibailes, theatre, performing arts, sewing, hiking, travel, sign language

## Giving back

I support the following charities and causes:

International Adoption, Korean Adoptee Identity, Home birth community, Le Leche League, Women in Small Business, Christian Parenting, Fatherless & At-Risk Populations, Dignity & Mental Wellness, Deaf & Hard of Hearing, Sports Ministry

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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.

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