



## Mark William Allert

### Financial Advisor

Virtual Advice Team

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thrivent.com/virtualadvice

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## Focused on what matters to you

Getting a holistic picture of your finances and identifying your next steps isn't always easy or clear. That's why I'm here to provide the expertise and support you need.

As a financial professional licensed to offer advisory services, I can take a comprehensive look at your financial landscape and provide specific written recommendations to help ensure you're well positioned to reach your goals.

Together, we can 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.
- Help build greater financial security for those you love through special needs planning.
- Address your advanced estate planning needs.
- Ensure a smooth and fair transition of your business with business continuation planning.

### Education and experience

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

### Personal profile

- Married 30 years to Deana
- Father to a 21 year old soon graduating from college and heading for law school
- Rotary Club President
- BA in Theology and International Studies, Texas Lutheran University
- MDiv from Pacific Lutheran Theological Seminary, Berkeley CA

### Giving back

I support the following charities and causes:

- Circle City Rotary Club
- Angels Over Cliffs
- Peppermint Ridge

I have also participated in or led 7 Thrivent Action Teams to support my community.

[Schedule an appointment](#)

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.