Gateway Associates

Quarterly Newsletter

July 2026

Our team

At Gateway Associates, you gain more than financial advice—you gain a team that listens, understands and walks beside you.

We get to know your story, your goals and what "financial done" looks like for you. Because our approach is relationship-first, your plan is built around your life, not just your finances.

thrivent.com/gatewayassociates

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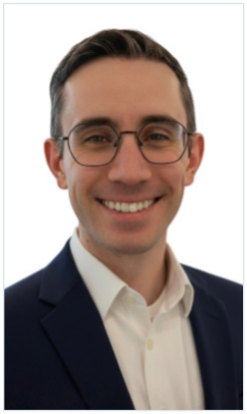
Scan to visit our website

Welcome to the team: Meet Ben and Conner



If you want to understand Ben, start with the word balance—it's the value he holds most deeply, both at work and in life. Outside the office, you'll find him adventuring with his wife and kids, whether that's walking trails, biking, hitting up waterparks or competing at the arcade. He's also the kind of person who spends a free evening trying a new recipe, tackling a home improvement project or diving into something new just for the love of learning.

When it comes to music, Ben keeps it classic—Bach's Cello Suites and Beethoven's String Quartets are his go-tos, though he'll be the first to tell you choosing between them is nearly impossible.

Ben was drawn to Gateway Associates by something he felt right away: a genuine connection with Bryan and the entire team from the very first conversation. "I loved that it was a small, high-performing team with big goals," he shares. In his role, Ben is most excited about partnering across the team to continue delivering exceptional client experiences—all while contributing to the long-term vision Bryan has built for the company.

Meet Office Professional Conner Pallan

Conner is the kind of person who is always moving—literally. When he's not in the office, you can find him on the golf course, on the basketball court, in the weight room, or logging miles outside. In fact, he's currently training for a half marathon this July—we're already cheering him on!

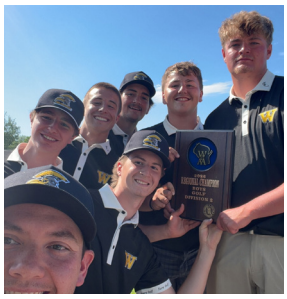
His playlist? Pearl Jam, always. And when it comes to what matters most, Conner keeps it simple: time with friends and family is where he recharges.

What drew Conner to Gateway Associates was the opportunity to do meaningful work—helping real people reach their financial goals while building lasting client relationships. He's especially excited to grow his knowledge of financial planning and deepen his understanding of how client data and systems come together to support the people Gateway serves.

We are so grateful to have Ben and Conner on the team and can't wait for our clients and community to get to know them.

Welcome to the Gateway Associates family, Ben and Conner!

Community impact: Making a difference beyond the office



We believe the values that make someone a great team member don't stop at the office door—and no one exemplifies that more than Support Advisor Logan DeMaa. From the golf course to the boardroom pitch stage, Logan has been quietly but powerfully investing in the next generation and the broader community around him.

Teeing up the future

Logan has been lending his time and talents to the Waupun Boys Golf team—this year's D2 Regional Champions. As a coach and supporter working alongside the program, Logan played a hands-on role in helping these young athletes show up ready to compete. The team's regional championship is a testament to what happens when dedicated coaches and community partners show up consistently for young people. We're cheering the Waupun boys on as they advance to the next rounds!

Mentoring tomorrow's entrepreneurs

Logan's commitment to youth development extends into the classroom as well. He recently served as a mentor for the IN-CubatorEdu Final Pitch Event for the School District of North Fond du Lac, held at Moraine Park Technical College. Students in the program spent months developing business ideas, and Logan—alongside a group of dedicated community mentors—helped guide them to the finish line. This year's judges were so impressed they awarded funding to not one, but four teams. For Logan, this kind of mentorship is a natural extension of the supportive, solutions-oriented approach he brings to his role every day.

Stepping up for Blood Cancer United

Logan's community involvement continues to grow. He has most recently joined the Emerging Leaders Committee for Blood Cancer United, an organization dedicated to funding research and supporting those affected by blood cancers.

A reflection of who we are

Logan's work in the community is a reflection of the values we strive to live out as a company: showing up, giving back and investing in people. We are incredibly proud to have him on our team and even prouder of the impact he is making far beyond it.

Want to learn more about the mission behind Blood Cancer United and how you can support their work? Read on in our next article.

Put Your Thrivent Choice Dollars® to work for Blood Cancer United

If you're a Thrivent member, you may be sitting on one of the easiest and most impactful ways to give back—and it won't cost you a single extra dollar. We're inviting you to direct your Thrivent Choice Dollars® toward Blood Cancer United and help power our Light the Night campaign this year.

What Are Thrivent Choice Dollars®?

Thrivent Choice Dollars® are charitable funds that eligible Thrivent members earn and can direct to enrolled nonprofit organizations of their choosing. It's giving made simple—and it's already yours to use.

How you can help

From now through our Light The Night Walk in September 2026, we are collecting Choice Dollar designations for Blood Cancer United. Every dollar directed helps us shine brighter on walk night and brings us closer to our fundraising goal for the year.

The best part? It couldn't be easier. Simply call our office and let us know how you'd like to split your Choice Dollars—whether that's directing 100% to Blood Cancer United or splitting them 50/50 with another organization you love. Our team will handle the rest and make sure your Choice Dollars are counted toward our 2026 campaign.

Every dollar shines bright

Light The Night is a reminder to those fighting blood cancers that they are not alone. Your Choice Dollars are a meaningful, effortless way to stand with them.

Ready to make your Choice Dollars count? Give us a call today and let's make this our brightest year yet.

Meet the team

Bryan Jansen,
MBA, CFP®, FIC, BFA™
Financial Advisor

Stephanie Sauerland
Administrative Assistant

Logan Demaa
Support Advisor

Dayanne Vega
Marketing Specialist

Anne Kovales
Support Advisor

Stephen Williams
CFP®
Director of Dedicated Planning Operations

Alex Klaes
Client Service Administrator

Megan Heinsma
Securities Associate

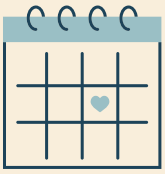
Ben Cook
Director of Operations

Easton Meckl
Paraplanner

Priscilla Moore
Office Professional

Conner Pallan
Office Professional

Jayne Hartin
Customer Service Coordinator



Important dates

July 4
Independence Day

July 13
Alex's birthday

July 13–17
Our team will take some time to recharge and do some team building this week, so our response times may be delayed.

August 16
Easton's anniversary

August 20
Jayne's birthday

August 31
Anne's birthday

September 7
Labor Day (office closed)

September 17
Light the Night Walk

September 29
Jayne's anniversary

Gateway Associates kicks off summer

Summer arrived at Gateway Associates with energy, purpose and plenty of community spirit. Here's a look at how we spent the early part of our summer.

Milwaukee Diaper Mission golf outing
We were proud to participate in the Milwaukee Diaper Mission golf outing, whose incredible work provides essential supplies to families across the area. We had a great time bringing some fun and energy to our spot on the course and cheering on the golfers as they played for a cause that truly matters. It was a privilege to be part of an event where community and competition come together for something bigger.

On your marks: Amazing Race Fond du Lac with YPF
One of the highlights of our summer was being part of Amazing Race Fond du Lac, hosted by Young Professionals of Fond du Lac (YPF).

Gateway Associates hosted a challenge stop where teams put their skills and their teamwork to the test as part of their race route. The evening wrapped up with an after-party at Fond du Lac Beer Company, and the energy throughout the night was nothing short of electric.

Giving back this summer: Falls Area Food Pantry
While we stepped back from our annual Christmas in July event this year, our commitment to supporting the Falls Area Food Pantry never wavered. We were proud to collect both online and in-person donations for the pantry through July 15, helping ensure that families in our area have access to the resources they need this summer.

More to come—stay tuned!
We have even more community events and fun planned for the rest of the summer, and we can't wait to share them with you. Be sure to check our events page regularly for the latest updates, and we hope to see you out there as the season continues.

Light the Night Walk and fundraiser

Thursday, September 17
Henry Maier Festival Park

Our lead advisor, Bryan Jansen, proudly serves on the Board of Trustees and as Chairperson for the Visionaries of the Year campaign. A cancer survivor himself, Bryan was honored as Man of the Year in 2019, and his personal journey continues to fuel his commitment to giving back. He has set a lifetime goal of raising $1 million to support the life-saving research that made his recovery possible.

In 2025, our team came together for our ninth annual Light the Night Walk, raising nearly $44,000 alongside our amazing community.

This year, Bryan is leading the Executive Challenge and has set a goal to raise $50,000. His fundraising page is live now, and we invite you to join him in making an impact.

Learn more about fundraising **here**.

More event details to come soon.

A financial tip every graduate needs before their first paycheck

Graduation season is here, and with it comes one of the most exciting financial milestones in a young person's life—that first real paycheck. Bryan has a piece of advice he wishes every new graduate would hear before day one.

Set up your buckets before you need them

Bryan's tip is simple, practical and easy to overlook in the excitement of starting a new job: open segmented accounts before your first paycheck arrives and automate transfers to each one from the very start.

Most of us know the basics—max your employer match, build an emergency fund and stick to a budget. But the sneaky-smart move, as Bryan puts it, is to make those habits automatic before you ever see the money sitting in your checking account. Set up a high-yield savings account or a Treasury fund ahead of time, assign a specific dollar amount to transfer automatically on payday, and let the system do the work for you.

Why it works

The psychology here is powerful. When money moves to its designated bucket automatically, you never have the chance to treat it as spending money. You adjust your lifestyle to what remains—not to the full amount. As Bryan explains it, the goal is to "get used to spending a certain budget without even having the chance to treat it like a cash reserve spend asset."

That small shift in structure makes an enormous difference over time.

The bottom line

If you or someone you know is stepping into the workforce this summer, share this tip: don't wait until after the paycheck lands to figure out where the money goes. Build the system first. Automate it. And let your future self thank you for it.

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Website: **thrivent.com/gatewayassociates**
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Facebook: **facebook.com/GatewayAssociates.Thrivent**

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