Heart of the Valley Wealth Advisors

thrivent

Heart of the Valley Wealth Advisors is a team of accomplished professionals with more than 60 years of combined experience in the financial industry. Our daily mission is to help you be wise with your money, managing it thoughtfully, so that you can experience life fully. Our team serves clients across the country, focusing in Appleton, Wisconsin, and San Jose, California.

Financial services

- Portfolio reviews: asset allocation, diversification and risk analysis[1]
- Personalized financial analysis
- Retirement income strategies
- Tax-efficiency and charitable gift strategies
- Estate protection strategies
- Business retirement plans: 401(k), SIMPLE IRA and SEP, nonqualified plans

Investment management

- Rollovers: IRAs, 401(k)s, 403(b)s, 457 plans, deferred compensation, profit sharing
- IRAs: Roth, traditional, Roth conversions
- Managed accounts: fee-based investment advisory services
- Annuities: immediate and deferred, fixed and variable, fixed indexed annuities
- Mutual funds
- Individual stocks, bonds and exchange traded funds (ETFs)
- College funding: 529 plans, Coverdell and custodial accounts

Risk management

- Life insurance: term whole life, universal, variable universal
- Disability income insurance

Dedicated Planning Services (for a fee)

Let's connect

thrivent.com/HOTVwealthadvisors
heartofthevalleywealthadvisors@thrivent.com

San Jose Office
2021 The Alameda, Ste. 140
San Jose, CA 95126
408-217-2934

Menasha Office
3102 Community Way
Menasha, WI 54952
920-423-3896

Office hours: Monday–Thursday 9 a.m. to 4 p.m.
Fridays and evenings by appointment.
Phone and Zoom appointments available.

Tom Bruckner, CFP®, Wealth Advisor
thomas.bruckner@thrivent.com
Tom is available as a resource and guide by providing honest feedback, an assessment of your options, and guidance about how to move forward. Tom joined Thrivent in 2003 and specializes in complex financial strategies, brokerage products and services, charitable planning, legacy planning, insurance and more. Tom works in our San Jose, California, office.

Troy Beck, FIC, CLTC®, Financial Consultant
troy.beck@thrivent.com
Troy can help you align your finances with your values to build a unique, comprehensive dedicated plan informed by your goals. Troy joined Thrivent in 2012. He specializes in retirement planning, tax-efficiency strategies, college planning and insurance. Troy works out of our Menasha, Wisconsin, and San Jose, California, offices.

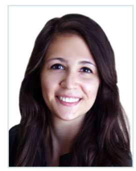
Ian Sorenson, Financial Advisor
ian.sorenson@thrivent.com
Ian's approach focuses on understanding each client's unique situation, defining meaningful goals and creating a clear path to achieve them. He believes communication and education are the foundation of every successful financial plan. Ian works out of our Menasha, Wisconsin office.

Michael Glantz, ChFC®, CLU®, FIC, Associate
michael.glantz@thrivent.com
Mike joined Thrivent in 1997. He thoroughly enjoys serving people and supporting Tom and Troy in creating strategies to help clients towards achieving their financial goals in a holistic manner. Mike works from our San Jose office.

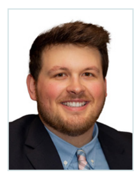
Edana Beck, Director of Operations
edana.beck@thrivent.com
Edana manages operations at both of our locations. She works closely with Tom and Troy to develop processes that increase efficiency and offer the best possible client experience. Edana has been working for Thrivent since 2014. She works from our San Jose, California office.

Rebekah Frank, Manager of Dedicated Planning Operations
rebekah.frank@thrivent.com
Rebekah onboards our clients for Dedicated Planning Services. If you take advantage of these services, she will be your first line of contact in between meetings with your financial advisor. Rebekah joined Thrivent in 2019 and works remotely from Portland, Oregon.

Allyson White, Client Service Coordinator
allyson.white@thrivent.com
Allyson is usually the first person to greet clients at our Menasha office, and she answers the phone at both of our offices. She also handles most of the scheduling for our team and prepares items the financial advisors need for meetings. Allyson works out of our Menasha, Wisconsin office.



Jessica Avena, Insurance Support Associate
jessica.avena@thrivent.com
Jessica joined Heart of the Valley Wealth Advisors in 2026. Prior to joining the team, she spent more than nine years in the financial industry, with a focus on life insurance and annuities. Jessica supports the team by assisting with life insurance and annuity questions and applications. She works remotely from Southern California.



Justin Sonnentag, Associate
justin.sonnentag@thrivent.com
Justin joined Thrivent in 2025 and Heart of the Valley Wealth Advisors in 2026. He graduated from the University of Wisconsin–Green Bay in 2022 with a business administration degree with an emphasis in marketing. Justin assists our clients with questions and follow up items from their meetings, particularly related to brokerage products. Justin works remotely from Oostburg, Wisconsin.

[1]While diversification can help reduce market risk, it does not eliminate it. Diversification does not ensure a profit or protect against loss in a declining market.

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Not all team members may office at the above addresses.

Not all team members may be appropriately licensed to provide all products and services or licensed to do business in all states.

Thrivent and its financial advisors and professionals do not provide legal, accounting or tax advice. Consult your attorney or tax professional.

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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