

Newsletter

Fall 2026

Our team



Founded by Rob and Brittany Lawson, our team works together to provide thoughtful financial guidance and personalized support. While you may work closely with one financial advisor, you'll benefit from an entire team dedicated to helping you navigate life's transitions with confidence. Whether answering questions, coordinating details or implementing recommendations, we're committed to walking alongside you as you build a future rich in purpose and gratitude. We're proud to be part of your financial journey and grateful for the opportunity to serve you.

thrivent.com/inspired

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Welcome!

One of the things we've learned over the years is that while we spend a lot of time together in meetings, there never seems to be enough time to share everything we'd like. There's always another story, lesson, office update, community event, interesting idea or piece of wisdom that gets left for "next time."

That's why we created this newsletter.

Think of it as another way for us to stay connected between meetings and events. Inside, you'll find updates from around the office, insights and ideas we're discussing with clients, a few lessons we've learned along the way, and occasionally something fun that simply made us smile.

Our hope is that this gives you the chance to get to know us a little better, see what's happening around IWA, and stay connected to the people walking alongside you and your family on your financial journey. We believe effective financial planning is built on great relationships and relationships are built one conversation at a time.

Thank you for being part of the IWA family. We hope you enjoy reading this as much as we enjoy putting it together. And if you see an event invitation in these pages, we hope you'll join us. It's always more fun when you're there.

Warmly,

Rob Lawson and Brittany Lawson
Inspired Wealth Advisors

Welcome Office Professional Elizabeth Mason

Elizabeth joined Inspired Wealth Advisors in April 2026 and serves as an office professional, supporting clients and the advisory team through scheduling, event planning, client communications and day-to-day operations. She enjoys helping clients feel welcomed and supported while keeping the many moving pieces of the office running smoothly.



Q&A

Favorite hobby? Sewing, crafting, and dancing—especially swing, tango, contra and Irish dance.

What's something people might be surprised to learn about you? I grew up raising and showing animals through 4-H.

What are some of your favorite things? Classic country, bluegrass and Irish music; rubber ducks, nutcrackers and time outdoors.

Upcoming events

All event details and RSVP information can be found on our website. Virtual events are hosted via Zoom, and meeting information will be provided after registration. For in-person events, RSVPs are managed through Eventbrite.



Scan the QR code to view upcoming events and RSVP.

Whether you're joining us online or in person, we look forward to connecting with you through educational workshops, client appreciation events and opportunities to engage with our community.

Questions?

Please contact us at InspiredWealthAdvisors@thrivent.com or 859-303-5139.



Planning

October 15: Extended individual tax return deadline

October 15 is the filing deadline for many individual taxpayers who extended their 2025 federal income tax return. If you're working through an extension, now is a good time to confirm filing status and any remaining requirements with your CPA or tax preparer.

November 26-27: IWA closed for Thanksgiving

December 1-24: Busy planning season; Meeting availability limited.

December 1: Year-end planning communication goal

If you're considering Roth conversions, charitable gifts, retirement distributions, major purchases or other tax-sensitive planning strategies, we encourage you to begin those conversations with our team before December whenever possible.

December 15: Year-end strategy execution target date

Many year-end planning strategies require coordination among custodians, employers, charities, tax professionals and financial institutions. Starting early can help avoid last-minute processing challenges.

December 25-31: Limited advisor availability; phone support only.

January 15: New year planning milestone

January is a natural time to revisit financial goals, cash flow needs, charitable intentions and tax planning priorities. It is also a key estimated tax payment deadline for many taxpayers.

Meet our team



Brittany Lawson
CFP®, ChFC®, FIC,
RICP®, CLTC®, BFA™
Wealth Advisor



Robert Lawson
FIC
Wealth Advisor



Beth Copeck
Senior Client Service
Administrator



Elizabeth Mason
Administrative
Assistant



Adam Campisano
Client Service
Administrator

Catch-up contributions after age 50 can help boost your retirement savings



Did you know there's a way for you to add additional dollars beyond the annual contribution limit of your retirement plan? If you're 50 years or older, catch-up contributions are a great way to increase and revitalize your retirement savings by potentially lowering your taxable income and increasing your principal investment.

You're eligible to make catch-up contributions if you meet these criteria:

- You are at least 50 years old or will be before the end of the year.
- You participate in a retirement plan that allows catch-up contributions (401(k), 403(b), IRAs, etc.).
- You've already met your regular contribution limit for the year.

Whether you're closing a budget gap, leaving more for your loved ones, or planning to give back to the community and organizations you support, catch-up contributions can move you closer to your desired retirement lifestyle.

Contact us to discuss catch-up contributions and how we can help you reach your retirement goals.



Serving

Update! June-July: CAP Fundraiser

Together, private donations along with a match from IWA and Thrivent helped us raise \$20,000 for the Christian Appalachian Project during a particularly challenging time following the destructive flooding in Richmond, Kentucky.

Update! September: Food Drive

We gathered 586 canned goods to donate to CAP through our Better Together Food Drive. IWA and Thrivent matched \$586.00 donated to CAP, and IWA staff, along with fellow clients, volunteered for three hours sorting not only the food we collected but also the donations gathered during CAP's Hunger Walk.

December 26: Cut off to apply for Thrivent Action Team

2026 Action Teams can be in 2027 if application is submitted for before or on December 26, 2026.

December 31: Cut off to designate Thrivent Choice Dollars

January 1: Thrivent Choice Dollars and Action Team member's delegations are refilled



Gathering

October 17: Fall fun at Eckert's Orchard

Visit our website or see the Upcoming Events section for more details.

October 31: Halloween

We hope you have a spooky Halloween!

November 24: Annual Thanksgiving open house + Old Fashioned happy hour.

Visit our website or see the Upcoming Events section for more details.

November 26: Thanksgiving

Wishing you a Happy Thanksgiving from the IWA Family.

December 25: Christmas

Wishing you a Merry Christmas from the IWA Family.

January 1: New Years

Wishing you a Happy New Years from the IWA Family.

January 20: Elizabeth's Birthday

Let's all wish a Happy Birthday to Elizabeth!

Following Beth's Example: Ideas for Leading a Thrivent Action Team



Do you want to make an impact in the communities, causes and lives of people you care about? Thrivent Action Teams, a benefit for Thrivent members, are here to help you.

Beth recently put her Thrivent Action Team benefit to work at her school's Summer Fest, using Thrivent Action Team funds to host a sand art booth and support the fundraiser. Thrivent Action Teams help members turn ideas into action by providing resources for service projects, fundraisers and community events. We're proud to see Beth using this unique benefit to make an impact in her community.

Here, Hendren shares five ideas of ways members can lead a Thrivent Action Team and how to use the up to \$250 of seed money that comes with the project.

- 1. Provide comfort.** Add some coziness to a hospital room by gathering a group of friends to make blankets for patients at your local children's hospital. Use the seed money to purchase blanket materials and supplies.
- 2. Improve your school.** Assemble backpacks for kids who need school supplies or launch an after-school snack program for kids dealing with food insecurity. Use the seed money to purchase snacks, backpacks and supplies.
- 3. Serve at your church.** Put together a summer community barbecue or Vacation Bible School (VBS) with your church. Use the seed money to purchase food for meals, supplies for outdoor kids' games or VBS starter kits and programs.
- 4. Teach others.** Host a workshop to teach people in your community something new—anything from personal finance and budgeting to mental health awareness or how to cook healthy, budget-friendly meals. Use the seed money to hire an expert, rent out a space, or for marketing and promotional materials.
- 5. Host an event.** Raise awareness and money for your favorite cause by hosting a fundraising event, providing food or beverages—whether that's a pancake breakfast, a coffee hour or a full dinner. Use the seed money to promote the event, purchase food or buy door prizes for donors.

Get more ideas!

Need more inspiration? [Check out the Thrivent Action Teams Hub](#) and take a look at activities others have done.

To learn more, read the full *Thrivent Magazine* article [here](#).

Elizabeth's 4-H fun fact

Pigeon fancying is the hobby of breeding, showing and racing domestic pigeons. The hundreds of domestic pigeon breeds descend from the rock dove. In fact, there is no scientific distinction between pigeons and doves, they are all members of the same bird family. Pigeon breeds are generally divided into flying/sporting, fancy and utility groups, with some pigeon races offering prizes exceeding \$1 million. Famous fanciers have included Queen Elizabeth II, Nikola Tesla, Pablo Picasso and Mike Tyson.



Staying connected and looking ahead

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Facebook: facebook.com/Inspired.Wealth.Advisors.Thrivent

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