

Newsletter

Volume 1

2025

Our team



Our goal is to help our clients protect who and what is important to them by understanding, educating, empowering and partnering with them to help them live abundant and generous lives. Through combined resources and access to capital, we provide our clients with tailored and comprehensive financial services and solutions.

Altamont Office

116 N Main St.
Altamont, IL 62411

Collinsville Office

506 Vandalia St.
Collinsville, IL 62234

Hoffman Office

103 S Broadway
Hoffman, IL 62250

thrivent.com/eckhardt

618-483-6167



We have grown ...



At Eckhardt Financial Group, we're committed to providing exceptional service and personalized financial advice. As we continue to grow, we want to introduce you to key members of our team who play an integral role in supporting your financial journey. When you work with one of us, you benefit from the collective expertise of our entire team with over 150 years of combined experience.



Logan Hepburn, CFP®, Investment Advisor

Logan plays a crucial role in aligning investment strategies with clients' financial goals. As a CERTIFIED FINANCIAL PLANNER™ professional with more than 10 years of industry experience, he works closely with clients to assess their risk tolerance and long-term objectives. Logan helps ensure investment portfolios are optimized for growth, making adjustments as needed to keep clients on track. With expertise in both personal and retirement investment management, Logan provides clients with tailored advice to support their financial success.



Eric Stiegman, Lead Advisor

Eric primarily works with clients in retirement, particularly farmers and small business owners, to see that their financial needs are met. He specializes in tax-efficient estate strategies, helping clients transfer wealth effectively while minimizing tax implications. Eric's knowledge in retirement planning helps clients stay on track for a comfortable future. His hands-on approach makes him a valued partner for clients, at every stage of life.



Leah Joyce, Director of Practice Development

Leah plays a critical role in helping the firm operate smoothly and efficiently while staying aligned with our strategic goals. She oversees daily operations across the

team, helping ensure staff members have the resources, support and structure they need to succeed. Leah's role extends beyond operations as she remains actively engaged with clients, handling complex financial matters and providing guidance. She is passionate about helping clients develop comprehensive plans that protect their loved ones and confirm they're on track to achieve their retirement goals. With designations in Long-Term Care (CLTC) and Retirement Income Planning (RICP), Leah brings a wealth of knowledge to both the operational and client-facing aspects of our practice.



Jonathon Stricker, CFP®, Senior Advisor

Jon is an experienced CERTIFIED FINANCIAL PLANNER™ professional dedicated to crafting personalized investment strategies and retirement plans. He collaborates closely with clients,

providing strategic guidance to help ensure their financial plans align with both immediate and long-term objectives. With a strong focus on retirement income planning, Jon helps clients structure their portfolios for sustainable income throughout retirement. Additionally, he specializes in investment management, leveraging his expertise in asset allocation and market trends to keep clients' investments on course.



Taylor Main, Director of Brokerage Operations/Financial Associate

Taylor wears two primary hats: He oversees all aspects of our brokerage operations to help ensure we deliver our promises while also serving as a key member of

our investment management team. As an advisor, his problem-solving skills and keen attention to detail help keep clients' financial journeys free from disruptions. Whether you are engaging in new investments or reviewing your accounts, Taylor provides guidance and support every step of the way.

Thank you for your confidence! We look forward to continuing to serve you.

On behalf of Eckhardt Financial Group,

Ryan Eckhardt, CFP®, Wealth Advisor

Dustin Eckhardt, CFP®, Wealth Advisor

Getting involved locally: Family Literacy Night at Southwestern Illinois College



Southwestern Illinois College recently hosted two incredible Family Literacy Nights, bringing families from diverse language and cultural backgrounds together to celebrate the joy of reading. These events offered a welcoming space for children to listen to engaging stories, while parents received valuable resources to support their family's reading journey at home. Each child had the chance to select books to take home, along with fun and practical supplies, including pens, pencils, notebooks, stickers and snacks.

As part of Thrivent's commitment to the community, Ryleigh Farar, Eckhardt Financial Group's newest receptionist extraordinaire, led a Thrivent Action Team to support SWIC in promoting literacy. Thrivent Action Teams empower Thrivent clients with membership to lead volunteer projects that support causes they care about. These projects can take the form of fundraisers, educational events or service activities. Thrivent provides resources to help kick-start these initiatives, including up to \$250 in seed money, "Live Generously" T-shirts and promotional materials.

A highlight of the evening was Ryleigh's dynamic reading of "David Gets in Trouble," which captivated young listeners. Thanks to her leadership, her Thrivent Action Team provided not only delicious food but also children's shirts as a special takeaway for participating families. These nights were a wonderful reminder of the power of community and literacy in shaping bright futures!

Meet the advisor team



Ryan Eckhardt
CFP®, FIC
Wealth Advisor



Logan Hepburn
CFP®, WMCP®
Associate



Dustin Eckhardt
CFP®, FIC
Wealth Advisor



Taylor Main
FIC, BFA™
Associate



Dick Eckhardt
FIC, CLTC®
Financial Associate



Adam Hautly
FIC, CRPC®, CEPA
Financial Consultant



Jonathon Stricker
CFP®
Financial Associate



William Ochs
Financial Advisor



Leah Joyce
FIC, RICP®, CLTC®
Director of Practice
Development



Tanya Crehan
CFP®
Associate Financial
Advisor



Eric Stiegman
Associate

Important dates

March 13

Debbie Taylor in-person event STL

March 17

St. Patrick's Day

April 15

Tax Day

April 18

Good Friday

April 20

Easter Sunday

April 21

Easter Monday

April 26

Shred day, Altamont office

May 26

Memorial Day

May 29

National 529 Day

Friendly reminder: Catch-up contributions 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.

Making an impact



Our impact

Eckhardt Financial Group is passionate about partnering with people and organizations that strive to make our community a better place to live and work. Our guidance and resources, together with contributions from our team members and our clients, allow us to support the causes we care about and give back in ways that make a difference. We are proud to share the impact we have made together.

Financial impact*

\$16,940,997

Thrivent Choice Dollars® directed, Thrivent Action Team funds raised, and Thrivent Community dollars

Total impact*

\$37,510,700

Financial impact, Thrivent Action Team seed funds, and total value of volunteer hours.

Client and community impact*

6,034

Thrivent Action Teams.

3,203

Thrivent Choice participants.

646,846

Thrivent Action Team, Charitable and Thrivent Community event volunteer hours.

81,193

Thrivent Action Team leaders and volunteers.

[Click here](#) to learn more about Thrivent Choice®. [Click here](#) to learn more about Thrivent Action Teams.

*From January 2023 to December 2023.

The Thrivent Choice® charitable grant program engages Thrivent clients with Membership and Thrivent Member Networks in providing grants that support charitable activities, furthering Thrivent's mission and its purposes under state law. All grant decisions, including grant recipients and amounts, are made at the sole discretion of Thrivent. Directing Choice Dollars® is subject to the program's terms and conditions available at thrivent.com/thriventchoice.

Member benefits, programs and activities are not guaranteed contractual benefits. You should never purchase or retain any insurance or annuity products simply to be able to participate. Participation is subject to applicable Terms and Conditions.

Our family is growing ...

We couldn't be happier for these families and are excited to watch these little ones grow!



Taylor Main welcomed his daughter, Lillian James Main, a precious baby girl who has already stolen hearts on July 25, 2024.



Heather Klein's daughter, Meaghan Staten, welcomed a baby boy, Lane Stephen Staten, on November 25, 2024. We're sure Heather is enjoying every moment as a proud grandmother!



Jen Halterman welcomed her daughter, Raelyn Grace Eblin, on December 2, 2024. She weighed in at 10.5 pounds—a bundle of joy who made a big entrance!



Tessa Dockins welcomed her son, Bennett Dean Steinkruger, on December 27, 2024. He weighed 7.2 pounds—the perfect Christmas blessing.



Zachary Sampl welcomed his son, Callahan Francis Sampl, on January 5, 2025. He was born during a winter snowstorm, making his arrival all the more memorable!

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