Insight Planning Group

Newsletter

Spring/Summer Edition — May 2026

Welcome to Insight Planning Group

At Insight Planning Group, everything starts with a plan—your plan. Our Insight Planning Process brings clarity and confidence to your financial life, helping turn goals into action. As life evolves, our ongoing, world-class service adapts with you, so your plan always reflects what matters most.

Our story

We take time to truly know you—what you're passionate about, the life you're building and the retirement you envision. That personal understanding is the foundation of every recommendation we make.

How we work with you

Using a data-driven, team-based approach, we partner with you to sit at the center of your financial life. Consider us your first call for financial questions and coordination, working alongside other professionals when needed.

What we offer

- Advice and ongoing planning services
- Investments: mutual funds, managed accounts and annuities
- Protection strategies: life insurance and disability income insurance
- Guidance around giving and generosity

Ready to begin? Let's start a conversation and bring your plan to life. Call us at 951-676-6450.

thrivent.com/insightplanning

insightplanninggroup@thrivent.com

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27280 Via Industria, Ste. A, Temecula, CA 92590
951-676-6450

Great Falls, Montana, office
2 Railroad Square, Ste. A, Great Falls, MT 59401
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Celebrating a remarkable honor with Wealth Advisor Bill Bohmer

We are proud to share some exciting and well-deserved news about our own Bill Bohmer.

On March 28, 2026, Bill was honored as a Thrivent Hall of Fame Legend—the highest distinction awarded to Thrivent financial advisors. This prestigious recognition is reserved for individuals who have demonstrated more than 30 years of exceptional service, unwavering dedication to their clients and a lasting impact on their communities.

What started as an opportunity for a college student became a lifelong vocation for Bill. He recalls, "I was young and up for an adventure. Best decision I ever made." Bill believes his success comes from loving the work itself, saying, "When the team, the clients and the mission align, the work doesn't feel like work." He believes in providing clarity and empowerment for his clients, but "my most meaningful accomplishment isn't a business milestone—it's the flexibility this career has given me to be present for my family." Bill is grateful for the many colleagues and joint work partners who have supported him along the way as well as his wife, Kirsten, and their children, Emily, Luke and Charlie.

Bill is one of only 11 advisors nationwide to receive this honor in 2026. Among Thrivent's more than 3,300 financial professionals, just 43 active advisors hold this distinguished title—placing him among the very best in the organization and across the industry.

Throughout his career, Bill has exemplified what it means to serve with purpose—helping clients plan confidently for the future, build meaningful legacies for their loved ones, and contribute to stronger, more vibrant communities. His commitment to providing clarity and empowerment in every client relationship reflects the very core of what we strive for at Insight Planning Group.

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Meet the team

Bill Bohmer, CFP®, ChFC®, CLU®, CASL®, FIC
Wealth Advisor
Temecula office

Michael Martin, CFP®
Wealth Advisor
Temecula office

Brett Mallette
Associate Wealth Advisor
Temecula office

Scott Berner
Financial Advisor
Lodi office

Jessica Pamenter
Director of Operations
Temecula office

Jennifer Farnum
Executive Assistant
Temecula office

Aleigh Whitehead
Relationship Manager
Temecula office

Marie Standiford
Relationship Manager
Great Falls office

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This recognition is not only a testament to Bill's professional excellence, but also to the trust and relationships he has built over the years with clients like you.

Please join us in congratulating Bill on this incredible achievement. We are honored to be a part of his team and proud to celebrate this milestone with our clients and community.

Hall of Fame Legends represent those Hall of Fame members who continue their dedication to our members since induction into the Thrivent Hall of Fame. To qualify as a Legend, a financial advisor or professional must reach 30 years of service, maintain a consistent level of production, and have a favorable compliance history.

This recognition does not evaluate the quality of services/advice provided to clients and is not indicative of the financial advisor or professional's future performance.

Exciting upgrades to Thrivent Choice®

Thrivent Choice is a generosity program that reflects the heart of Thrivent—empowering clients with membership to have a voice in how Thrivent distributes millions in grant funding each year. Since 2010, members like you have helped Thrivent distribute nearly $660 million to nonprofit organizations and churches nationwide.

Good news! We're excited to share upgrades that make the program simpler, more flexible, and available to more members:

Choice Dollars® are now designated once per year, in full, based on the prior year's qualifying product activity. Members have the entire year—through December 31—to direct Choice Dollars to the enrolled nonprofits and causes you care about. This gives you the flexibility to direct Choice Dollars anytime throughout the year—on your schedule and in support of what matters most to you.

Access to the program has also expanded. All Thrivent members are now eligible to receive Choice Dollars, more than doubling the number of members who can participate. Whether you're a longtime user or newly eligible, you now have even more opportunities to make a meaningful impact.

Don't wait – Direct Choice Dollars by **clicking here** today.

Why it matters – Each Choice Dollar you direct equals one dollar Thrivent donates to an eligible nonprofit—making it a simple, powerful way to support the causes closest to your heart.

Need help? We're here to make the process easy, so you can focus on what matters most: making a difference.

Live generously!

We've moved! Welcome to our new Great Falls office

We are excited to share a meaningful milestone for our team and our community—Insight Planning Group has officially moved into our new Great Falls location.

After more than 20 years in the same space, Insight Planning Group is on the move, and we can't wait to welcome you. This transition marks the beginning of an exciting new chapter—one that reflects our continued commitment to providing clarity and empowerment as we help you plan for your financial future.

This new chapter is built around you—your goals, your future and our shared commitment to helping you live your best financial life.

We are incredibly grateful for the trust you have placed in us over the years and look forward to continuing to serve you in our new home.

Stay connected

Allowing us to serve those you know, love and care about is the best possible compliment! We are currently accepting new clients. We appreciate your trust!

Website: **thrivent.com/insightplanning**
Email: **insightplanninggroup@thrivent.com**

Important dates & office closures

May 25
Memorial Day
(offices closed)

June 19
Juneteenth
(offices closed)

July 3
Independence Day observed
(offices closed)

September 7
Labor Day (offices closed)