thrivent

Vista Point News

Spring 2026

Our team

Our team specializes in retirement income planning, investment management, tax efficient-financial strategies, wealth transfer strategies and generosity.

At Vista Point Wealth Advisors, we spend time getting to know our clients as individuals, including incorporating their values into their financial objectives. We pride ourselves on providing unparalleled customer service.

thrivent.com/vistapoint

Scottsdale office
17015 N. Scottsdale Rd., Ste. 335
Scottsdale, AZ 85255

Prescott office
201 N. Alarcon
Prescott, AZ 86301

Greetings from Vista Point Wealth Advisors

As we enter the second quarter of the year, our team remains grounded in what matters most—faith, family, integrity, generosity and service. This season is a natural time to pause, reflect and confirm your financial plans continue to support the life you're building and the people you care about. We're honored to partner with you and look forward to sharing timely insights, updates and stories in this quarter's newsletter.

Tax planning is more than a once-a-year conversation

For many people, taxes feel like something to deal with around April 15. But in reality, tax planning is most effective when it's viewed as an ongoing part of your overall financial plan, not a single moment in time.

Nearly every financial decision—how you save, invest, give or draw income—can have tax implications. That's why we encourage clients to think about taxes throughout the year, not just during filing season. Planning ahead allows you to be more intentional and avoid decisions that may look good today but create unintended consequences down the road.

It's also important to remember that tax decisions don't exist in a vacuum. They often intersect with beneficiary designations, estate planning documents and legacy goals. Whether you're planning for retirement income, supporting the next generation, or thinking about how assets will eventually be passed on, coordination matters. Small oversights—like outdated beneficiaries or unaligned account strategies—can unintentionally create tax inefficiencies or complicate the transfer of assets.

While we don't provide tax advice, we regularly work alongside clients and their tax and legal professionals to help ensure financial strategies are aligned and thoughtfully coordinated. Reviewing beneficiary designations and legacy goals as part of your broader financial picture is one simple way to help keep your plan current and reflective of what matters most to you.

If you've experienced changes in income, family circumstances or goals—or if it's simply been a while since your last review—this is a great time to revisit how tax considerations, beneficiary planning and long-term goals fit together.

As always, our team is here as a resource and a sounding board. Thoughtful planning today can help create greater clarity and confidence for the people and purposes you care about most.

Meet our team

Brian Brooks, CFP®, ChFC, FICF, FIC, CKA
Wealth Advisor

Nick Goins, BFA
Financial Advisor

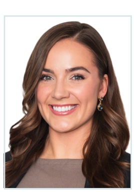
Dylan Skov
Financial Advisor

Nolan Brooks, MBA
Financial Advisor

Scott Byrdy
Director of Investment Operations

Lisa Shillingburg
Operations Manager

Jessi Reyes
Practice Support Associate



Cire Gottdiner
Client Service Administrator

Welcome Cire Gottdiner

We are excited to welcome Cire Gottdiner (pronounced KEER-uh) as our new client service administrator.

Cire is often the first person clients meet—whether greeting them in our office or helping coordinate appointments and communications. She is dedicated to making each client's experience easy, comfortable and truly welcoming. With natural kindness and openness, Cire approaches her work with a genuine desire to build trusting, personal relationships and to create an environment where clients feel supported and confident throughout their financial journey.

Before joining Vista Point Wealth Advisors, Cire worked in clinical research project management and holds a Bachelor of Science degree in biology from Regis University in Denver. While her career path has shifted, she is excited to grow in the financial services field and to contribute to a team that prioritizes purpose-driven client care.

Originally from Cincinnati, Cire is a loyal Bengals and Reds fan and still has a soft spot for Skyline Chili. She and Grant recently married back home in Cincinnati in September 2025. Since relocating to Phoenix, she has enjoyed exploring the local food scene with friends and is always open to restaurant recommendations. Outside of work, Cire enjoys reading, traveling, pickleball, cooking and has recently taken up golfing with her husband.

Please join us in welcoming Cire—we're grateful to have her as part of our team.

Upcoming event

Come see "Toy Story 5" with us

June 19 at 2 p.m.
Harkins Theaters
7000 E. Mayo Blvd., Phoenix, AZ 85054

Our team is excited to host a movie event on June 19 at 2 p.m. featuring the release of "Toy Story 5"—a film with truly intergenerational appeal, bringing together kids, parents and grandparents for a fun, shared experience. In addition to the movie, we'll be collecting new, unwrapped toys to support HopeKids Arizona, an organization that serves children and families facing life-threatening medical conditions.

If you're joining us, we invite you to bring a toy and help spread a little joy. And if you know someone who would enjoy the movie night or wants to support the toy drive, they're welcome too. We're grateful to be part of a community that values connection, generosity and looking out for one another.

Contact 480-563-1367 or **lisa.shillingburg@thrivent.com** to RSVP.

No products will be sold.

Recognizing a commitment to generosity

I'm honored to share that I've been recognized by Thrivent Charitable as a 2025 Voices in Philanthropy (VIP) financial advisor—an honor given to just 101 advisors nationwide. This recognition reflects the meaningful ways our clients choose to live generously and support the causes that matter most to them.

At Vista Point Wealth Advisors, charitable planning is often an important part of a broader financial strategy—connecting purpose, values and lasting impact. It's a privilege to walk alongside clients as they plan with generosity in mind.

If charitable giving or legacy planning is something you'd like to explore, I'd welcome the conversation.

Brian Brooks, Wealth Advisor

Let's connect

At Visa Point Wealth Advisors, we value the relationships we've built with the families we serve. Financial planning isn't just about numbers or markets—it's about helping people make thoughtful decisions that support the life they want to live and the people they care about most.

Many of you have been with us through different seasons of life—career changes, growing families, retirement transitions and everything in between. It's a privilege our entire team doesn't take lightly. We approach this work with care, integrity and a long-term perspective, always striving to be a steady and trusted resource.

From time to time, clients will ask how they can help us, and the greatest compliment we can receive is a personal introduction. If someone close to you—a family member, friend or colleague—is facing financial questions or simply wants a second set of eyes on their plan, we're always happy to be a resource. No pressure, no obligation—just a conversation.

Thank you for your continued trust and for being an important part of our Vista Point Wealth Advisors family. We look forward to walking alongside you in the months ahead.

Website: **thrivent.com/vistapoint**
Facebook: **facebook.com/Vista.Point.Wealth.Advisors.Thrivent**

Important dates

May 16
Feed My Starving Children meal pack, 8:30–11 a.m.

May 25
Memorial Day (office closed)

June 19
"Toy Story 5" movie event with toy drive for HopeKids Arizona, 2 p.m.

July 2
Office closes at noon

July 3
Office closed in recognition of Independence Day