

Quarterly Newsletter

Second quarter

April 2024

Our team



At Mengel Morse and Associates, we are passionate about helping you achieve new possibilities through holistic and meaningful advice. Our process includes understanding your financial goals and objectives, then analyzing, strategizing and designing a plan for your unique situation.

thrivent.com/mengelmorse

Schenectady Office

3418 Carman Rd.
Schenectady, NY 12303

518-453-3500

Office hours: 9 a.m. – 5 p.m.
Monday through Friday

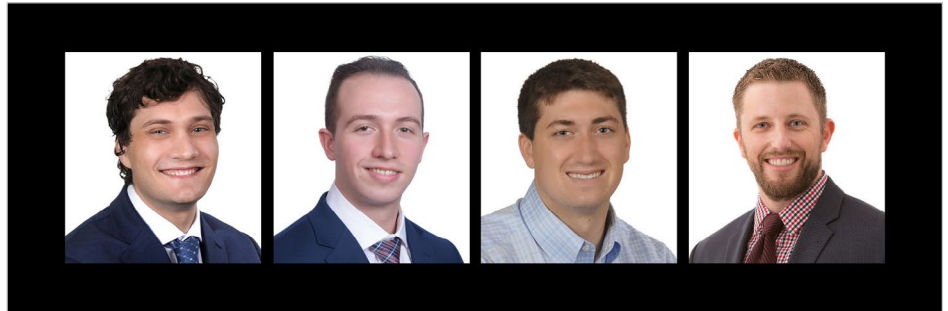
Doylestown Office

350 South Main St., Suite 310
Doylestown, PA 18901

215-230-8488

Office hours: 8 a.m. – 4 p.m.
Monday through Thursday

Multigenerational advising



Mengel Morse and Associates is a firm focused on serving clients for generations. Clients come to us at every stage of life and they work hard to organize their finances. Our best effort to preserve this work is done by working alongside spouses, children and grandchildren, helping them understand the most efficient ways to grow and spend hard-earned dollars. We believe that we should also share our multigenerational journey with you.

Adding Simon, Steve, Grant and Tony to the team is our way of preserving the work that Greg and Bob have done for many years. Passing on our knowledge to younger financial advisors allows us to help serve you in the most professional and efficient ways and helps ensure you always have someone to pick up the phone and answer your questions, as well as someone you can personally introduce to your family members. If you haven't met the boys yet, look for one of them at your next appointment. If you have family members we should meet, we would love the referral and the opportunity to involve them in your planning process.

Questions about Social Security? We've got answers.

When it comes to Social Security, there is much to consider. Social Security can be an essential building block of your retirement planning, but your benefits depend on many variables, including what age you choose to claim, as well as your lifestyle and retirement goals.



Understanding what Social Security options work best for your unique situation can help you plan ahead. [Read this article](#) to learn more about Social Security benefits, and then let's talk about how to incorporate them into your retirement strategy.

Meet the team



Gregory Mengel
MBA, ChFC®, CLU, FIC
Wealth Advisor
Schenectady Office



Megan Tebay
Financial Associate
300 N. Pottstown Pike
Ste. 170
Exton, PA 19341



Robert Morse
Financial Consultant
Doylestown Office



Amanda Moorhouse
Director of Operations
Schenectady Office



Stephen Strand
ChFC®, LUTCF, FIC, RICP
Financial Associate
113 Kimberly Dr.
Manchester, CT 06040



Lee Calamaio
Director of Investment
Operations
751 E. Capricorn Way
Chandler, AZ 85249



Tony Mason
FIC
Financial Advisor
2212 Manuela Dr.
Chaska, MN 55318



Marlene Blattstein
Office Manager
Schenectady Office



John Prouty
Financial Advisor
123 Hale Haven Dr.
Hilton, NY 14468



Cathy Quali
Licensed Office
Professional
Doylestown Office



Grant Mengel
Financial Advisor
Schenectady Office



Dawn Mengel
Office Professional
Schenectady Office



Simon Blattstein
Financial Advisor
Schenectady Office

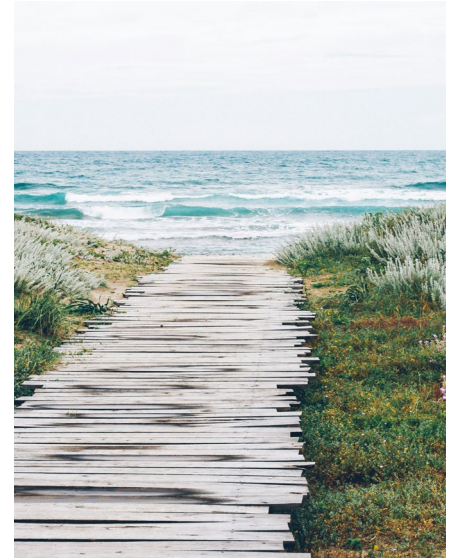


Téa Goncalves
Office Professional
Schenectady Office



Steve Warren
CFP®
Financial Advisor
Schenectady Office

Our team's favorite summer vacation spots



Summer is right around the corner, so we asked our team where their favorite spot is to vacation when the weather gets warm. Here are some of the varied answers:

Leavenworth, Washington

Cape Cod, Massachusetts

Outer Banks, North Carolina

Lake George, New York

Long Beach, New York

Ocean City, New Jersey

Jersey Shore, New Jersey

Brainerd, Minnesota

West Glacier, Montana

Chandler, Arizona

Seaside, Oregon

Ogunquit, Maine

Hilton Head, South Carolina

Banff, Canada

Spring into the warmer weather with these cocktail recipes



Peach Bellini

1 lb. fresh or frozen sliced peaches, plus more for serving

¼ c. fresh or frozen strawberries, plus more for serving

½ c. peach schnapps

1 bottle prosecco or sparkling white wine

Add the peaches, strawberries, and peach schnapps to the pitcher of a blender. Cover tightly with the lid, and blend at high speed until smooth.

Divide the peach mixture among six glasses. Garnish each glass with more peaches or strawberries, if you like. Fill each glass half full of prosecco; stir and add more prosecco if you like.



White wine spritzer

12 fruity ice cubes

1½ c. very cold white wine

½ c. sparkling water or club soda

Lemon slices, for garnish

Fresh mint sprigs, for garnish

To make the fruity ice cubes: Add blackberries and strawberries to the wells of two ice cube trays as desired. Add water until each well is three-fourths full. Freeze until solid, about 12 hours.

To make the spritzers: Divide the fruity ice cubes between two wine glasses. Divide the wine between the glasses, then top evenly with the sparkling water. Garnish each spritzer with lemon and mint if you like.

Upcoming events

Virtual Economic Update

Monday, July 22 at 7 p.m. Eastern time | [Register now](#)

Tuesday, July 23 at 1:30 p.m. Eastern time | [Register now](#)

Hosted by: Mengel Morse and Associates.

These days, news about the economy seems to dominate the media. But should it influence the decisions you make regarding your financial strategy? Get Thrivent's perspective on the economy to help you invest with greater confidence. Attend Economic Update to get answers to questions, like:

- How should I react to economic headlines?
- How have fiscal measures changed in the past quarter?
- How often should I review my investment strategy?

No products will be sold.

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Important dates

Monday, May 27

Memorial Day
(office closed)

Friday, June 14

Flag Day

Sunday, June 16

Father's Day

Wednesday, June 19

Juneteenth
(office closed)

Monday, September 2

Labor Day
(office closed)

Stay connected

Website: thrivent.com/mengelmorse

Email: mengelmorseandassociates@thrivent.com

Facebook: facebook.com/gregory.mengel.thrivent

Instagram: instagram.com/mengelmorseandassoc.thrivent

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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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