

Thrivent Magazine



Live your calling

5 ways to express generosity through faithful stewardship

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Handled with care

Reaching new heights

A Thrivent client creates opportunities for the next generation of aviators.

By Donna Hein

Barbara Wheeler wanted to create a legacy to honor her late husband's passion for flying.

"Mike learned how to fly before he learned to drive," says Wheeler, of Green Bay, Wisconsin.

He got his pilot's license in high school, and went into the U.S. Army after graduation, where he learned to fly a helicopter. While in the Army, he earned his associate's and bachelor's degrees from Embry-Riddle Aeronautical University in Daytona Beach, Florida. He retired from the Army after 21 years, but he never stopped flying. He flew emergency medical services flights, and he flew for the joy of it. He was working for the Federal Aviation Administration in 2010 when he died doing what he loved most—flying.

Mike and Barbara had lived in New York, and when she retired in 2014, she moved to Wisconsin. Her son-in-law, who works for Thrivent, suggested she meet with a Thrivent financial advisor to discuss her financial strategy.

She sat down with Stacie Patchett, Thrivent financial associate, and Ben Carr, Thrivent financial advisor, to talk about her financial investments. Her late husband had left Barbara well-positioned financially. The financial advisors worked with Barbara to create a tax-efficient strategy that could enable her to



Barbara Wheeler (left) works with Thrivent's Ben Carr and Stacie Patchett on planning a legacy.

be comfortable in retirement, while honoring her wishes to leave a legacy to her daughter, Erin, and grandson Roman.

"After updating her plan, she still had additional cash she wasn't going to need," Carr says. "It was clear from our conversations that legacy was important to Barbara, and it went beyond what she wanted to pass on to the next generations."

That's when they began talking about setting up a donor-advised fund to continue the work Mike was passionate about.

Patchett connected with Thrivent Charitable Impact & Investing® and Embry-Riddle, Mike's alma mater. Together they explored options for how the dollars could be used to touch potential future aviators. Covering the expenses of weeklong camps for teens interested in flying jumped to the top of the list.

"This was near and dear to Mike's heart," Patchett says.

The donor-advised fund, set up in 2019, provides for two teens each summer to attend Embry-Riddle Aeronautical University's Flight Exploration Summer Camp. While the COVID-19 pandemic caused a delay to the start of the scholarships, it didn't hamper Barbara's excitement.

Barbara's full vision for the fund

became reality in the summer of 2022. The first two students attended camp on the scholarships and learned about concepts such as ground safety, meteorology and careers in aeronautics. Both wrote Barbara letters of gratitude.

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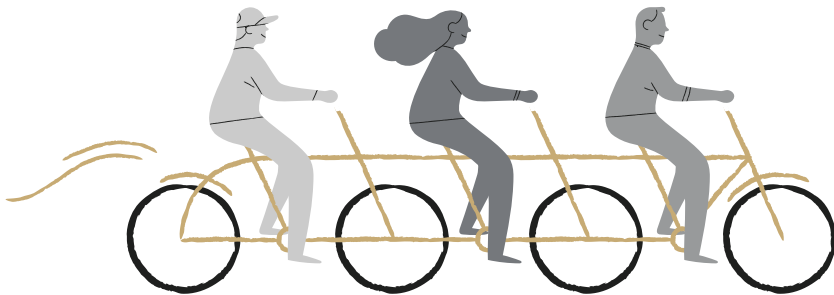
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On my mind

Embedding diversity, equity and inclusion in all that we do

Diversity, equity and inclusion (DEI) is a significant focus for most companies today.

By Ken Charles



When I joined Thrivent last year, I was inspired by our purpose and our promise. Thrivent is a force for good in the world, and I believe that light should be shared with everyone in every community.

That desire is at the core of our DEI strategy. In order to remain relevant and to grow and serve future generations, it's essential to have a diverse, equitable and inclusive culture.

But what does that mean? Let's start with some simple definitions.

- Diversity means that we embrace our differences.
- Equity means that we ensure fairness.
- Inclusion means that we respect everyone.

These are the foundational principles. We want to hire and retain undeniably great talent to serve our clients—and we want a workforce that is diverse to reflect the communities that we serve. Our long-term goal is to be the financial services leader in DEI,

making it a competitive advantage for Thrivent.

Thrivent's DEI strategy is based on four key pillars, all of which are critical to serving our clients and communities.

1) Talent: Attract, develop and retain a high-performing, diverse workforce that's focused every day on making a meaningful impact on the lives of those we serve.

2) Culture: Build an environment of trust where everyone feels respected, valued and a sense of belonging that inspires them to achieve their fullest potential.

3) Serve & grow clients: Inspire trust and enable our organization to serve more diverse clients and communities.

4) Build & serve community: Bring positive change to our communities through philanthropy, advocacy, investment and client engagement.

And this focus isn't just a "nice to have," it's a "need to have." When we focus on DEI, Thrivent wins—including our clients and our workforce—in the following ways:

- Inclusive hiring and a reputation as an employer of choice allows Thrivent to build diverse teams to grow and serve future generations.
- Welcoming diverse perspectives and cultivating a culture of inclusion drives innovation. No two people are the same. Since new ideas fuel our digital ambitions, diversity of thought and experience is at the core of transformation.
- Inviting diverse voices allows us to connect with clients and communities in mutually beneficial ways. By listening with empathy, we can advise new and existing clients and gain unique insights to serve clients the way they want to be served.
- Furthering positive change in our communities increases impact and visibility, further cementing Thrivent as a trusted community partner.

As we continue to build a solid DEI foundation at Thrivent, I acknowledge that we have a ways to go. The journey to become a diverse, equitable and inclusive organization is one that's ongoing. But I am optimistic about our future.

For more on this topic, I invite you to review Thrivent's inaugural *Diversity, Equity & Inclusion Report*, published in June, which is available on thrivent.com/DEIreport.



Ken Charles is senior vice president, chief diversity, equity and inclusion officer and corporate responsibility officer at Thrivent.