Mengel Morse and Associates

thrivent

Financial guidance and clarity that spans generations

Mengel Morse and Associates was founded in 2017 by Greg Mengel and Bob Morse, who ran successful practices at Thrivent for more than 20 years. Our combined financial skill sets, backed by a well-rounded team of experienced and caring professionals, allow us to provide a more complete experience for our clients across 39 states, including New York, Pennsylvania, Delaware and Connecticut.

Our commitment is that you are informed and educated at every step of your journey, as we help ensure you have plans in place to protect what matters most, retain more of your assets, and efficiently transfer your wealth.

Let's connect

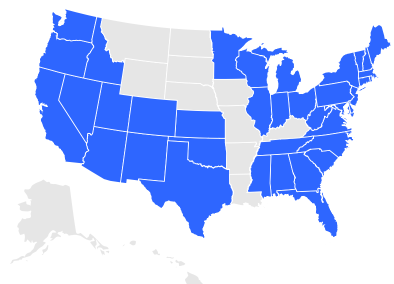
thrivent.com/mengelmorse

Schenectady office

3418 Carman Rd
Schenectady, NY 12303
518-453-3500
Monday–Friday 9 a.m. to 5 p.m.

Doylestown office

350 South Main St., Ste. 310
Doylestown, PA 18901
215-230-8488
Monday–Thursday 8 a.m. to 4 p.m.



Our team serves clients nationally and is licensed in:

AL	IL	NH	SC
AZ	IN	NJ	TN
CA	KS	NM	TX
CO	MA	NV	UT
CT	MD	NY	VA
DC	ME	OH	VT
DE	MI	OK	WA
FL	MN	OR	WI
GA	MS	PA	WV
ID	NC	RI	

As of February 2025.

How we work together

Our approach goes beyond any one topic. Whether you're seeking guidance on managing wealth you've accumulated or have several financial goals in mind, our advice integrates your objectives into a personalized blueprint that grows and changes with your needs and goals. We develop customized solutions across these key areas:

Tax planning

Retirement distribution strategies

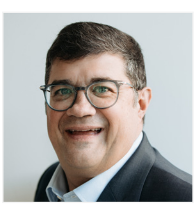
Estate planning

Investments

We offer a clear and detailed process for evaluating each client and providing customized financial solutions tailored to meet your needs. Our process includes:

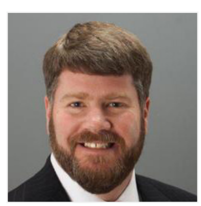
- Gathering data about our clients and their goals and objectives.
- Requesting tax returns and account statements from our clients.
- Strategizing based on a thorough analysis of the documents provided and our clients' unique situations.
- Meeting with our clients again to present our analysis and recommendations.
- Partnering with our clients through ongoing reviews so that we can adapt to life changes.

Our team



Greg Mengel
MBA, ChFC®, CLU®, FIC
Wealth Advisor
CA Insurance Lic. #0I31022
3418 Carman Rd.
Schenectady, NY 12303

Greg has been with Thrivent since 2001 and recently qualified for Thrivent's 2022 Hall of Fame.[1] He spends most of each day helping clients and prospects craft investment, retirement distribution and tax-efficient strategies to work towards a more financially secure retirement. Greg and his wife, Dawn, have two adult children, Marin and Grant. Greg enjoys traveling, reading, attempting to golf and following his beloved Chicago sports teams on TV or in person.



Robert Morse
Financial Consultant
CA Insurance Lic. #0M70439
350 S Main St., Ste. 310
Doylestown, PA 18901

Bob has worked as a Thrivent financial consultant since 1994 and qualified for Thrivent's 2020 Hall of Fame.[1] What he enjoys most is the deep relationships he forms with his clients. Bob focuses his work on distribution planning, estate planning, tax analysis, investments and insurance to assist clients in reaching their retirement goals. He and his wife, Lisa, have three adult children, Steven, Ben and Jessica. Bob enjoys traveling, golf, fly fishing and outdoor activities.

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

Steve has been with Thrivent since 1991 and joined Mengel Morse and Associates in 2020. He recently qualified for Thrivent's 2022 Hall of Fame Legends.[2] His main interests are traveling with his wife, Karen, walking their dog, Cali, following Major League Baseball (go Red Sox) and listening to music. A fun fact about Steve is that he has been to all 50 states.

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

John recently retired from a 35-year career as a chemistry and physics teacher. He joined Thrivent in 2021 and is now putting his passion for education to use by helping families gain the best financial knowledge possible for their specific situation. John enjoys working together with clients to develop clarity and security in money decisions.

Grant Mengel
Financial Advisor
3418 Carman Rd.
Schenectady, NY 12303

Grant joined Thrivent as a financial advisor in 2022 after graduating from the University of Connecticut with a finance degree. He interned in the Schenectady office for the past few summers and is now both insurance and securities licensed. He joined the team as part of the next generation who will help clients long after Greg and Bob retire. When Grant isn't in the office, he is either finding ways to stay active, watching sports, coaching basketball or spending time in Cape Cod.

Simon Blattstein
Financial Advisor
3418 Carman Rd.
Schenectady, NY 12303

Simon graduated from Binghamton University in May 2022 with a Bachelor of Science degree in business Administration. He interned with Thrivent for three summers before joining the team full time as a financial advisor in 2022 after graduating college and passing his licensing exams. In his free time, Simon enjoys rooting for losing New York sports teams like the Mets and the Rangers, as well as golfing and traveling.

Steve Warren
CFP®
Financial Advisor
3418 Carman Rd.
Schenectady, NY 12303

Steve graduated from Temple University with a double major in finance and financial planning. He is passionate about building long-term relationships with clients and helping ensure that every angle of their financial picture has been addressed. In his free time, Steve enjoys staying active, golfing and reading.

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

Megan has been with Thrivent since 2013 and joined Mengel Morse and Associates in 2024. She believes helping people is her true calling in life and feels honored to work for a company that connects faith and finances. She loves helping clients achieve the retirement of their dreams. When Megan is not working, she enjoys spending time with her family, playing softball and football, and cheering on her beloved Philly sports teams.

Kyle Roos
Practice Supt Associate
3418 Carman Rd.
Schenectady, NY 12303

Kyle joined Thrivent in 2023 as a financial advisor on the Virtual Advice Team and came to Mengel Morse and Associates in 2024. He feels blessed to be able to have two careers that he is passionate about, helping people with their finances, and aviation. When Kyle is not working here, you can find him flying the KC-135 for the Air Force Reserves, or spending time with his wife, Sarah and son, DJ and their 2 dogs.

Amanda Moorhouse
Director of Operations
3418 Carman Rd.
Schenectady, NY 12303

Amanda started her career in the financial services industry in 2009 and joined Mengel Morse and Associates in 2023. Her passion is helping businesses grow to their fullest potential and walking alongside business owners to help them reach their calling from God. When Amanda is not in the office, you'll find her embarking on ultra-marathon runs, remote camping excursions, backcountry skiing expeditions, or spending time traveling with her husband, Brad.

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

Lee has worked and been licensed at Thrivent since 2008. He is responsible for portfolio research, design, implementation and tracking, plus investment-related client activity. Lee has been married to Nicole since 2001 and has three teenagers, including twin girls. He loves to spend time by any body of water, preferably with a nice boat drink.

Marlene Blattstein
Office Manager
3418 Carman Rd.
Schenectady, NY 12303

Marlene has worked at Thrivent since 2013. She handles scheduling client appointments and assists with the day-to-day servicing of clients' needs. Marlene is married with three children and two Yorkies. She enjoys reading, gardening, volunteering at the Ronald McDonald House, and spending time with family and friends.

Cathy Quali
Licensed Office Professional
350 S Main St., Ste. 310
Doylestown, PA 18901

Cathy has worked at Thrivent since 2004 and been licensed since 2009. She assists with client needs, is quick to respond and eager to help. Cathy enjoys traveling, hiking and spending time with family and friends.

Dawn Mengel
Office Professional
3418 Carman Rd.
Schenectady, NY 12303

Dawn has worked at Thrivent since 2006. She manages the marketing program, including workshops, events and social media. Dawn is married to Greg and has two young adult children. She enjoys traveling, reading and relaxing in Cape Cod with her family.

Téa Goncalves
Office Professional
3418 Carman Rd.
Schenectady, NY 12303

Téa is a recent graduate from the University of Connecticut. She has a degree in sport management and enjoys all things marketing and social media, as well as creating content for both purposes. Outside of the office, Tea enjoys reading and watching sports. She is a huge Boston sports fan and likes to attend as many games as she can.

[1]Hall of Fame represents long-term commitment to our organization with consistent performance. Financial advisors and professionals qualify for Hall of Fame by achieving at least 20 years of service, a consistent level of production, and having a favorable compliance history. This recognition does not evaluate the quality of services/advice provided to clients and is not indicative the financial advisor or professionals future performance.

[2]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 professionals future performance.

About Thrivent

Founded on shared beliefs, Thrivent has been helping others live more generous lives while guiding them on their financial path. We are a holistic financial services organization, providing financial advice, investments, insurance, banking and generosity programs to help our clients make the most of all they've been given.

We help you live with more purpose and gratitude

Your financial clarity is our priority
No matter what you need, count on us to deliver transparent experiences that reflect what's most important to you.

We enable you to live life more fully
We recognize that when you have what you need financially, you're able to focus on the things that really matter, like the interests you enjoy and the people you love.

We're here to be a partner
From the unique way we structure our organization to the financial guidance we provide, know that we're on your side.

Service you can count on

For more than 120 years, Thrivent has helped people build their financial futures and live more generous lives. Today, we're a Fortune 500 company, offering a full range of expert financial solutions, serving more than 2 million clients, as well as the communities in which they live and work.

$179 billion assets under management/ advisement[3]

Rated by:
AM Best, Moody's Investors Service and S&P Global Ratings[4]

Serving 2.4 million clients

ETHISPHERE® WORLD'S MOST ETHICAL COMPANIES® 2012 - 2024

Thrivent was named one of the "World's Most Ethical Companies" by the Ethisphere Institute 13 years in a row.

Contact information

For questions and assistance with **In-Force Insurance** contracts, please contact Kyle Roos at 518-453-3500, ext. 120 or kyle.roos@thrivent.com.

For **Life Insurance and Annuity** service requests, please contact Cathy Quali at 215-230-8488 or cathy.quali@thrivent.com.

For **Mutual Fund and Brokerage** service requests, please contact Grant Mengel, 518-453-3500, ext. 104 or grant.mengel@thrivent.com, Simon Blattstein, 518-453-3500, ext. 102 or simon.blattstein@thrivent.com, or Steve Warren, 518-453-3500, ext. 111 or steven.warren@thrivent.com.

To schedule an appointment with Greg or Bob, please contact Marlene Blattstein at 518-453-3500, ext. 101 or marlene.blattstein@thrivent.com.

To schedule an appointment with Stephen Strand, John Prouty or Megan Tebay, please contact them directly:
stephen.strand@thrivent.com or 860-305-5685
john.prouty@thrivent.com or 585-208-4365
megan.tebay@thrivent.com or 484-875-0202

[3]As of Dec. 31, 2023.

[4]Ratings are based on Thrivent's financial strength and claims-paying ability. Does not apply to investment product performance. For information on each rating, visit the individual rating agency's website.

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Not all team members can provide all products, programs and services in all states.

Thrivent and its financial advisors and professionals do not provide legal, accounting or tax advice. Consult your attorney or tax professional.

Thrivent is the marketing name for Thrivent Financial for Lutherans. Insurance products issued by Thrivent. Not available in all states. Securities and investment advisory services offered through Thrivent Investment Management Inc., a registered investment adviser, member FINRA and SIPC, and a subsidiary of Thrivent. Licensed agent/producer of Thrivent. Registered representative of Thrivent Investment Management Inc. Thrivent.com/disclosures.

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