

Quarterly Newsletter

Third quarter

July 2024

Let's connect

thrivent.com/fivestarfancial

Brenham Office

203 S. Jackson St.
Brenham, TX 77833
979-836-0693, Opt. 1

Mon. to Thurs.: 8 a.m. to 5 p.m. CT
Fri.: 8 a.m. to 3 p.m. CT
Closed: Noon to 1 p.m. CT

White Sulphur Springs Office

201 W. Main St.
White Sulphur Springs, MT 59645
406-547-6358

Mon. to Thurs.: 8 a.m. to 5 p.m. MT
Fri.: 8 a.m. to 3 p.m. MT
Closed: Noon to 1 p.m. MT



Thrivent Market & Economic Update

Wondering how to navigate current market conditions? Thrivent and Five Star Financial Group remain committed to providing guidance to help you stay informed and up-to-date on what's going on with the markets and economy.

Listen to the latest [Market & Economic Update](#) to hear from Thrivent investment leaders on how recent economic trends could impact your financial strategy. They'll share timely and valuable perspectives on:

- The health of today's economy.
- Inflation and interest rates.
- Factors influencing growth at large public companies.
- Market implications of current global geopolitical events.

Create a charitable giving plan with tax-smart benefits

Charitable giving can help you gain a greater sense of gratitude for what you've earned. Giving generously to your family, community and society can also be a key part of a tax-efficient financial strategy.

Giving back provides personal satisfaction, helps make the world a better place, shows your gratitude, and shares your values. [Read this article](#) to learn more about purposeful giving, and then let's talk about how you can integrate giving with your financial goals.



Upcoming events

Montana shred fest event

July 24 from 1 to 3 p.m.

Meagher County City Library

On July 24, our Montana office will be hosting a shred fest event from 1–3 p.m. to benefit the Meagher County Community Foundation and Meagher County Library Foundation. We invite you to securely dispose of personal documents while enjoying the company of the community to kick off Red Ants Pants Music Festival. Food and refreshments will be provided.



Labor Day weekend golf tournament

Five Star Financial Group is hosting our second Labor Day weekend golf tournament scramble in White Sulphur Springs, Montana, to benefit the Meagher County 4-H Council. Grab your clubs and join us for a nine-hole tournament, spots are limited. We hope to see you on the course!



For registration information, contact the office at 406-547-6358. Registration will be open until August 16.

White Sulphur Springs PRCA Labor Day Rodeo

Part of the Five Star Team is heading back to Montana as a proud sponsor of this year's PRCA Labor Day Rodeo in White Sulphur Springs, Montana. We are looking forward to another great year of supporting our Montana community.



Christmas toy drive

In December, our Brenham office will be teaming up with Toys for Tots of Washington County for their Christmas Toy Drive. We ask that you consider applying for a Thrivent Action Team to donate gifts this year.

We will be collecting donated items at the Brenham office. Please watch for the announcement of future dates.

No products will be sold at these events.



Important dates

Thursday, July 4

Independence Day
(offices closed July 4–5)

Monday, September 2

Labor Day
(offices closed)

Both offices will have limited staff from

August 30–September 4.

Sunday, September 8

Happy
Grandparents' Day

Wednesday, September 11

Patriot Day—
We remember

Summer interns introduction

Clayton Boeker—Texas Office

My name is Clayton Boeker, and I am an intern at Thrivent. Brenham has been my home all my life and my family has lived here for generations, both farming and ranching. I am a personal financial planning student at Texas Tech University going into my senior year, with a path to attain a master's degree in personal financial planning by 2026. At Texas Tech, I am the current treasurer of the Personal Financial Planning Association, a financial coach for KEY (Knowledge-Empowers-You), and a financial educator in Red to Black. I am also a member of President's Select and a varsity starter for the Texas Tech Overwatch Esports team.



Personal financial planning was not always my path, but after taking just one class in the major, I fell in love with it. I strongly desire to help people and teach them financial concepts that help them meet their financial goals. My goal in life is to have a career that is fulfilling and allows me to make a positive tangible impact on those around me. I am beyond thankful to the leadership team at Thrivent for providing me with the opportunity to further my education as an intern in the Brenham office.

Brooke Thorp—Montana Office

Hi, my name is Brooke Thorp. I'm a marketing major at Montana State University. I was born and raised in White Sulphur Springs where my high school career was a whirlwind of sports and extracurriculars. One standout was my involvement in the local Business Professionals of America Chapter, which really sparked my interest in the business world. Now, I'm thrilled to be diving deeper into the world of business professionalism with Thrivent.



When I'm not at the office, you'll likely find me out and about, diving into various projects and activities such as playing volleyball, hiking and attempting to cook. Throughout my many years of customer service, I've grown to love connecting with customers and learning their stories. My goal is to help as many people as possible whether that's through something large, or something small. I am excited for this opportunity, and I cannot wait to connect with the Thrivent community.

Stay connected

Website: thrivent.com/fivestarfinancial

Email: fivestarfinancialgroup@thrivent.com

Facebook: facebook.com/Five.Star.Financial.Group.Thrivent

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.

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

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