

Newsletter

May 2025

Our team



Ascend National Wealth Advisors

Serving our clients and their loved ones across the country.

thrivent.com/ascend

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Plan with purpose, not predictions

By Austen Wilson



Life is full of uncertainties—whether it's market shifts, tax law changes or personal milestones. As I prepare for fatherhood (more on that on page 3), I've been reminded that while we can't predict the future, we can prepare for it. At Ascend National Wealth Advisors, we believe preparation starts with leaning into your faith, values and principles to guide your financial (and life) decisions.

It's natural to want clarity about what lies ahead—whether it's market movements or legislative changes. But predictions often fall short, leaving us chasing uncertainty. Instead, preparation empowers you to focus on what you can control: building a strong financial foundation rooted in your goals and values.

Preparation equips you to navigate life's twists and turns with resilience. Strengthening your financial plan—diversifying investments, maintaining an emergency fund and aligning decisions with your long-term goals—is essential. Staying grounded in your values helps ensure that your financial choices reflect what matters most to you: faith, family and generosity. And anticipating transitions—whether planning for retirement or navigating unexpected challenges—keeps you ready for whatever comes next.

As your team of financial professionals, we're here to help make preparation simple and effective. Together, we can:

Review and update your financial plan to reflect current goals and priorities

Help you navigate upcoming changes like new tax laws in 2025 that may create opportunities for savings or charitable giving

Provide guidance on life transitions, whether it's retirement planning or managing unexpected events

True clarity doesn't come from knowing what's next—it comes from knowing you're prepared for whatever it may be. Our team is here to help you build confidence by creating a plan rooted in your values and tailored to your unique journey. Let's focus on preparation together so you can approach the future with clarity and assurance.

In faith and service,
Austen Wilson, MBA, BFA™, Financial Advisor

Welcome to Ascend National Wealth Advisors
Kevin Gleim, CLU®, LUTCF®, FICF, FIC
Financial Associate

We're excited to announce that Kevin Gleim, a financial associate with more than 40 years of experience at Thrivent, has joined our team. Kevin has spent decades guiding families in making financial decisions that align with their values, and we're honored to partner with him to continue that mission.



Through this partnership, we're blending Kevin's decades of individual experience with our collaborative approach to elevate the care and services we provide. Together, we'll continue offering personalized guidance while expanding our ability to support your goals, strengthen community connections and help you align your finances with what matters most.

Kevin has been a mentor and friend to our team leader, Austen Wilson, for many years. Their shared values—faith, family, and service—are at the heart of this partnership.

We're thrilled to have Kevin join us as we continue our mission of helping you navigate life's financial transitions with confidence and purpose.

Upcoming events

- May 11
Happy Mother's Day
- May 13 & 14
Don't Worry, Retire Happy with Tom Hegna
[Register here](#)
- May 16
Women's Prosperi-tea: Wisdom, Wealth and Well-being
- May 20
5 Keys to Retiring Fearlessly [Register here](#)
- June 15
Happy Father's Day
- No products will be sold.

Riddle us this

I can be shared but never owned.
I grow stronger when given freely yet leave a lasting mark when received.
I can build bridges, inspire action and bring people together.
What am I?
Think you can be the quickest of Q2? Email jaynee.hartland@thrivent.com with your answer!

Celebrating your impact in 2024

What an incredible year of generosity and service! In 2024, our clients made an extraordinary impact—more than 33,000 volunteer hours, nearly \$9.2 million directed to causes, and hundreds of events that strengthened communities. We're honored to walk alongside you as you live out your values and make a difference.

Looking ahead, how can we support you in giving back? Whether it's through Thrivent Action Teams, charitable giving strategies, or community initiatives, we're here to help. Reach out to us at melissa.fellers@thrivent.com to explore how we can partner with you in making an even greater impact this year.



Lutheran Church Charities: K-9 Comfort Dog Ministry

This past Thanksgiving, Thrivent members Kyra and Rudy Carbone, along with Eternal Shepherd Lutheran Church in South Carolina, embodied the spirit of giving in a remarkable way. Their Thrivent Action Team, supported by a Thrivent Action Card, assembled 100 personal care bags filled with essential toiletries to bring much-needed comfort to low-income seniors at Lutheran Towers in Atlanta. The generosity didn't stop there—additional donations came from church members, store discounts and even strangers in line who were inspired by their mission.

Relationship Manager Melissa Fellers had the privilege of joining the Thrivent Action Team during this meaningful visit. Reflecting on the experience, she shared: "It was heartwarming to see the joy and gratitude on the faces of the seniors. This experience truly highlighted the impact of faith in action."

LCC K-9 Comfort Dog Ministry® is a national initiative of Lutheran Church Charities that uses trained Golden Retrievers to provide comfort and care to people in need, whether during daily community outreach or in times of disaster and crisis. With more than 130 Comfort Dogs serving across 27 states, these animals act as bridges for compassionate ministry, creating opportunities to share faith and offer hope.

To learn more about Lutheran Church Charities and discover how you can make a difference, [visit their website](#) at Lutheran Church Charities.

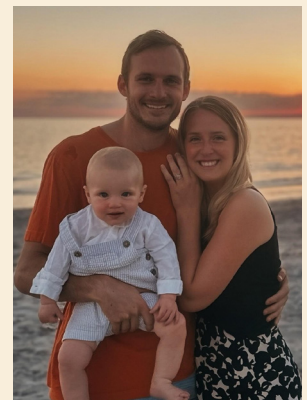
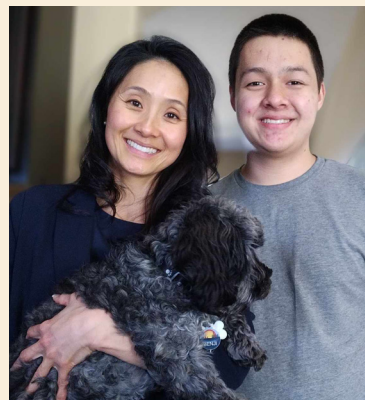


Happy Mother's Day!

This quarter, we're celebrating the incredible moms (and soon-to-be moms) on our team who inspire us every day with their dedication to family, faith and service.

A special shoutout to Austen and Allegra Wilson, who are expecting a baby girl this July!

To all the moms in our lives—thank you for the love and strength you bring to everything you do. You're an inspiration!



Share the gift of financial confidence



As an Ascend National Wealth Advisors client, you already know the value of personalized financial guidance. Why not share this benefit with your family and friends?

Recommend us when loved ones are:

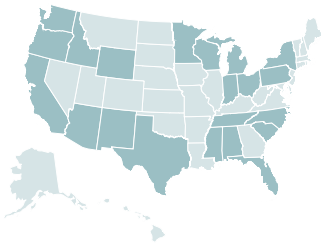
- Facing major life transitions.
- Stressed about finances.
- Needing investment or retirement planning help.
- Seeking to align finances with values.
- Requiring estate planning assistance.

How we help:

- Customized financial plans.
- Experienced investment guidance.
- Retirement strategies.
- Estate planning solutions.
- Values-based financial advice.

To refer people, simply provide your financial advisor with their contact information or have them reach out to us directly. We'll offer a complimentary consultation to understand their needs.

By referring, you're giving the gift of financial confidence. Let's extend sound financial guidance to those you care about most.



Our team serves clients nationally and is licensed in:

AL	MN	PA
AZ	MS	SC
CA	NC	TN
FL	NM	TX
ID	NY	WA
IN	OH	WI
MI	OR	WY

As of May 2025.

Stay connected

Check our team website and Facebook page for the latest news and upcoming events.

Website: thrivent.com/ascend
Facebook: facebook.com/ascendadvisors

Lutheran Church Charities and K-9 Comfort Dog Ministry are not affiliated with or endorsed by Thrivent.

While diversification can help reduce market risk, it does not eliminate it. Diversification does not assure a profit or protect against loss in a declining market.

Member benefits and programs are not guaranteed contractual benefits. The interpretation of the provisions of these benefits and programs is at the sole discretion of Thrivent. Membership benefits are reviewed and evaluated regularly. Thrivent reserves the right to change, modify, discontinue, or refuse to provide any of the membership benefits or any part of them, at any time.

You should never purchase or keep insurance or annuity products to be eligible for nonguaranteed membership benefits. You should only purchase and keep insurance and annuity products that best meet the financial security needs of you and your family. Consider the cost, features, and benefits of specific insurance and/or annuity products.

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

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 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](https://thrivent.com/disclosures).

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