

# Quarterly Newsletter

Second quarter

April 2024

## Our team



**Redefining wealth and elevating your journey with faith-based financial care.**

[thrivent.com/ascend](https://thrivent.com/ascend)

**253-271-3290**

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Bellevue  
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## New Name, Same Vision

As you may already be aware, our practice has recently reached a new chapter in our story. In this article, we want to offer you a behind-the-scenes glimpse into what led us to choosing Ascend National Wealth Advisors and the inspiration we drew from you along the way.

**Why Ascend?** Since the establishment of our practice, we've embraced the principle of striving to be "1% better" every day. This mantra has served as our compass, challenging us to consistently refine our service model and uphold the highest standards for our clients. We saw this philosophy reflected in the imagery of ascending, embodying the essence of progress.

Ascend not only represents our renewed dedication to serving you with excellence but also as our commitment to serving God in all we do. We believe that faith should illuminate every aspect of life, including our financial perspective, which is why we strive to align our services with biblical wisdom.

**Why National?** As our team transitioned to utilizing more virtual spaces in 2020, we recognized our ability to offer the convenience of remote services without compromising care or quality. As clients began connecting our team with their loved ones across the nation, we realized that our service was no longer constrained by physical boundaries. This shift allowed us to grow and bring aboard new team members based on their merit and values rather than their proximity. Today, with our current team of 17 members spanning across eight states, our expanded capabilities enable us to serve whole families whether they're minutes or miles apart.

**Why Wealth?** We perceive wealth as an expression of a holistic perspective on both finance and life. A financial journey is about more than just reaching a destination—because, ultimately, money is not the end goal. We advocate for a definition of genuine wealth that encompasses our clients' health, relationships,



well-being, and faith. This is why our partnership with our clients extends throughout every moment of the journey; it's within these moments that we uncover greater perspective, meaning, and true prosperity.

**A nod to you.** The road to Ascend has been remarkable, and we have you to thank—your stories, passions, and perspectives have

been the inspiration that has defined our team. Through meaningful conversations with you, we have witnessed a shift towards prioritizing what truly matters. It is our goal that the work we do reflects the values that shape your life.

We want to express our gratitude to each and every one of our clients. Thank you for seeing us as more

than just a voice on the other end of the line. As we continue to build and evolve, we remain committed to serving you and your family for generations to come.

It is an honor to be your partners and we look forward to the journey ahead.

*Your dedicated financial team*

## Meet our new team members



### Kristin Jones | Senior Relationship Manager

Kristin joined our team with more than two decades of multifaceted experience in the financial industry. She resides in the Lehigh Valley area of Pennsylvania with her two children, five cats and dog. Outside of work, she channels her compassion as a volunteer at a local animal rescue, where she serves as an advocate for animals in need.



### J.W. Burt, BFA™ | Financial Advisor

J.W. joined Thrivent in 2020 to align his passion and skillset with his dreams of making a positive impact. As a financial advisor, he uses visuals and clear communication to assist clients in achieving financial clarity, finding fulfillment in collaborating with them to discover opportunities and creative solutions. Outside of work, J.W. actively volunteers with his church and cherishes moments with his fiancée, Kaitlin, and his dog, Abe.

## Riddle us this

**“I am small and round, yet hold great potential, buried in darkness, my growth is sequential. Nurtured with care, I’ll break free and soar. A humble beginning, yet what lies in store? What am I?”**

Email [jayne.hartland@thrivent.com](mailto:jayne.hartland@thrivent.com) with your answer. The first person with the correct answer will get a shoutout in our next newsletter.



Shoutout to Dale Zehms and Suzanne Cornwall for being the quickest on our last riddle!

## A ‘Garden within a Garden’

### Steilacoom Historical Community Garden

By Marlene Kam, supporter of SHCG

Steilacoom, among its neighboring towns in Pierce County, stood distinctively as the sole locality without a dedicated community garden. This absence meant that their local food pantry struggled to maintain a steady stock of fresh fruits and vegetables sourced directly from the community. In May 2022, six individuals who were motivated to address this gap took the initiative to establish Steilacoom Historical Community Garden (SHCG) for their beloved “Town on the Sound.”

In addition to contributing to their local food pantry, they have also established a partnership with Steilacoom High School, providing free heirloom seeds and education on plant cultivation and local history.

Their garden of 30 beds is completely organic, with six beds exclusively reserved for 100% heirloom plants. These particular beds adhere strictly to traditional settler methods, avoiding the use of metal, plastic, or fertilizers—an endeavor they dub the “Settlers’ Kitchen Garden.” Additionally, an allocated section will be under the stewardship of the Steilacoom Tribe, spotlighting native plants and herbs significant to indigenous culture and heritage.

Marlene Kam, a devoted supporter of SHCG and a member of our Ascend community, has taken the initiative to apply for a grant. This grant proposal is geared towards strengthening the garden fence to deter deer intrusion and roof repair for their tool shed and food pantry kitchen.

To learn more about SHCG, visit [townofsteilacoom.org/309/Community-Garden](http://townofsteilacoom.org/309/Community-Garden).



We can do more, together!  
Check out the amazing impact our community has made. You can track our community impact through our new website.

#### Financial impact

**\$1,181,596**

Thrivent Choice Dollars® directed, Thrivent Action Team funds raised & Thrivent Community dollars

#### Total impact

**\$3,885,709**

Financial impact, Thrivent Action Team seed funds, and total value of volunteer hours

#### Client & community impact

**782**

Thrivent Action Teams

**587**

Thrivent Choice® participants

**10,869**

Thrivent Action Team leaders & volunteers

**85,035**

Thrivent Action Team & Thrivent Community volunteer hours

## Meet the team



**Austen Wilson**  
MBA, BFA™  
Financial Advisor  
Bellevue, WA



**Alex Reeder**  
Director of  
Operations  
Seattle, WA



**Ellis Holderbecker**  
Director of Client  
Experience  
Charleston, SC



**Brian Lee**  
Service Advisor  
Clarksville, TN



**Tanner Holderbecker**  
Administrative  
Assistant  
Plymouth, MN



**Jayne Hartland**  
Marketing  
Coordinator  
Olympia, WA



**Phil Wuerffel**  
Market Director  
Tacoma, WA



**Andrew Schroeder**  
Support Advisor  
Charlotte, NC



**Kim Nash-Walker**  
Director of Investment  
Operations  
Salem, WI



**Monty Harmon**  
Associate  
Olympia, WA



**Catherine Krauter**  
Office Professional  
Kenosha, WI



**Suzy Scott**  
Executive Assistant  
Seattle, WA



**Melissa Fellers**  
Relationship  
Manager  
Indian Land, SC



**Nicholas Dare**  
MBA, CFP®, BFA™  
Financial Advisor  
Federal Way, WA

**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 April 2024.

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