Financial Foliage

Quarterly Newsletter Summer 2026

Canopy Financial Group

803-768-4696

1108 Harrington St.
Newberry, SC 29108
M–F: 9 a.m.–5 p.m.

Mark your calendar

July 21, 11 a.m.
Estate Planning workshop

July 21, 6–7 p.m.
Women, Wealth and Wisdom workshop

July 30, 6 p.m.
Estate Planning workshop

Aug. 6, 5:30–7:30 p.m.
"On Tap for Life's Transitions"

Aug. 27, 6–7 p.m.
Women, Wealth and Wisdom workshop

WHERE MONEY MEANS MORE™

thrivent

We're walking the walk and talking the talk

Members of the crew assisting in the rebuild of the incline ramp across the creek inside the park

Canopy Financial Group's financial advisors are out in the wild! From helping support your goals in the office to supporting our community outside the office, our financial advisors are extending their hands and skills to support some amazing organizations.

Financial Advisor Travis Goodman worked alongside the Palmetto Trail and South Carolina Wildlife Federation at the end of May at the Rocky Branch Natural Area—Little Mountain to help rebuild one of the many bridges across the trail. A fun-filled day as Canopy Financial Group is developing a partnership with the Palmetto Trail project. Keep an eye out for more information to come about this incredible partnership.

Building connections across the state

Written by Financial Advisor Anna Jones

Recently added to the Thrivent Choice® catalog, Goodwill Industries of the Upstate Midlands will be in the spotlight on the Canopy Financial Group social media channels this July. Goodwill is so much more than the beloved

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thrift store, and we want our clients to know more about what they do.

This collaboration focuses on connecting clients to local, high impact initiatives—like Goodwill's Clean Tech Accelerator, which equips individuals with industry certifications, paid training and career pathways in high-demand fields. Together, we aim to empower clients to direct their generosity through Thrivent Choice and other charitable planning strategies, creating lasting impact for families and communities across South Carolina.

To direct your 2026 Choice Dollars® to Goodwill of the Upstate Midlands, **click here**.

More organizations can receive Choice Dollars

We're excited to highlight organizations that were added to the Thrivent Choice catalog in the last quarter. Plus, Thrivent Choice has gotten an upgrade. All Choice Dollars for the year can be directed in one go—and all Thrivent members are now eligible to direct Choice Dollars. To get started, click on an organization below or visit **thrivent.com/choice**.

Organizations recently added to Thrivent Choice:

- **Let's Walk**
- **What About Our Children**
- **The Gathering Place Collective**
- **South Carolina Women of the ELCA**
- **Goodwill Industries of the Upstate Midlands**

Know an organization making a difference in your community that isn't listed? Thrivent members can recommend organizations for enrollment.

Our community in action

As promised, we wanted to highlight some of the amazing work you are all doing in your communities through the **Thrivent Action Teams** program. Over the past three months, you have helped fill Blessing Boxes with shelf-stable food items, sanitary items and much-needed hygiene products. You've also donated food, cleaning supplies, beds and toys to local animal shelters that support animals in their care.

You are providing items to support the unhoused in your cities and towns to new families with basic baby necessities. You're helping host vacation Bible school programs and warm lunches for your local marching bands. The work you are doing in your communities to support those from all walks of life is truly heartwarming.

If you're looking for ways to put your generosity into action, check out these **75 ideas for impact**.

We are here to cheer you on and help you keep doing good. If you want to share one of your local projects in our newsletter, send us a quick description and photos to **canopyfinancialgroup@thrivent.com**.

Thrivent Day with Newberry College Baseball recap

Thanks to everyone who joined us on April 18 at the Newberry College Baseball game. We enjoyed seeing you all out and about and enjoying the beautiful weather and baseball.

Thanks to your generous donations, we collected more than 150 items, which were donated to the Wolves Pantry, a space on the campus of Newberry College for students to access shelf-stable food and hygiene products.

Summer recipe to share: Fruit trifle

Looking for the perfect summer dessert to bring to a get-together, the beach or even just to enjoy on the couch? Try this fruit trifle recipe from tastebetterfromscratch.com.

Ingredients:

1 bundt pan angel food cake
5–6 cups of fresh fruit of your choice (we suggest blueberries, strawberries, oranges and grapes)
2 cups of heavy whipping cream
½ cup of powdered sugar
2 teaspoons of vanilla extract

To make your own vanilla pudding, you will need:

2⅔ cups of whole milk, divided
½ cups of granulated sugar
¼ cups of cornstarch
¼ teaspoon of salt
2 teaspoons of vanilla extract
1 large egg

Instructions:

Pudding:

- In a medium saucepan over medium heat, bring 2 cups of the milk to a boil.
- While the milk is heating, combine sugar, cornstarch and salt in a large mixing bowl. Gradually whisk in the remaining ⅔ cup milk, stirring until no clumps remain. Add the egg and whisk until smooth.
- Once the milk is boiling, slowly add it to the sugar mixture, stirring constantly.
- Return the entire mixture back to the saucepan, stirring constantly until it comes to a simmer. Cook for one more minute, until thickened. Remove from heat and stir in the vanilla extract. (If the pudding has any lumps you can strain it through a fine mesh strainer.)
- Transfer pudding to a heat-proof bowl and cover with plastic wrap, pressing it directly on the surface of the pudding. Refrigerate until chilled completely. Store covered in the fridge.

Whipped cream:

- Add the cream to a large mixing bowl. Beat with electric mixers on high speed for a few seconds. Add powdered sugar and vanilla and continue beating until stiff peaks are created.

Assembly:

- Cut or tear the angel food cake into chunks. Prepare fruit by washing and slicing as needed. Add a layer of cake pieces to the bottom of the trifle. Scoop several spoonfuls of pudding on top. Add a variety of the fruit, then a few spoonfuls of whipped cream. Repeat process until the trifle is filled.
- Refrigerate until ready to serve, or for up to 2–3 days (the fruit will taste the best day-of).

Upcoming events

Estate Planning workshops

Tuesday, July 21 at 11 a.m.–noon and Thursday, July 30 at 6–7 p.m.
Canopy Financial Group–Thrivent office, 1108 Harrington St., Newberry, SC

During this free workshop, we'll explore estate strategies and tools you can use to make your final wishes clear. No matter your wealth or status, you have an estate. And all estates have something in common—you can't take it with you when you die. During Prepare Wisely: Estate Strategy Essentials, you'll learn:

- How different asset types are treated when inherited
- How to get what you want to whom you want
- Tools and strategies for easier and more tax-efficient legacy planning

Light refreshments will be served.

- July 21: **Register here**
- July 30: **Register here**

Women, Wealth and Wisdom workshops

Tuesday, July 21, 6–7 p.m. | Roxanne's Market, 2900 Dreher Shoals Rd., Ste. A, Columbia, SC
Thursday, August 27, 6–7 p.m. | Brew, 7000 Bowen Pier Dr., Ste. 1, Hanahan, SC

During this workshop, we'll enjoy a meal together as we hear stories about six women who have figured out a few things about their finances—and enriched their lives in ways beyond what's in their bank accounts. Learn how to apply real-world lessons about managing finances and reaching financial goals so that you can live the life you want, protect your most valuable asset and pay it forward.

- July 21: **RSVP here**
- Aug. 27: **RSVP here**

On Tap for Life's Transitions

Thursday, August 6, 5:30–7:30 p.m. | Holy City Brewing, 1021 Aragon Ave., Charleston, SC

Join us for a casual evening where we'll connect, relax and celebrate one year of serving our community through life's many changes. Enjoy time with great people, good drinks and meaningful conversation as we reflect on the journey so far and look ahead to what's next.

Feel free to bring a friend—we'd love to meet the people who matter most to you.

RSVP by July 30 by texting 843-806-3994 or emailing **leander.mcguigan@thrivent.com**.

Meet our team

Financial Advisor Robert Kopp (Newberry)
Financial Advisor Travis Goodman (Chapin)
Financial Advisor Sherry Sheppard (Summerville)
Financial Advisor Leander McGuigan (Summerville)
Financial Producer I Jordan Sweetenburg (Newberry)
Financial Advisor Anna Jones (N.E. Columbia)
Insurance Support Associate Samantha Snyder
Office Professional Kimberly Goodman
Insurance Office Professional Kendall Francis

Refer a friend

Do you know someone who could benefit from our guidance? Send them our way. Thank you for your confidence in our team. See how you can reach us below.

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No products will be sold at these events.

Not all team members may office at the above address.

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

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