Canopy Financial Group

thrivent®

Financial Foliage

Quarterly Newsletter Fall 2026

Canopy Financial Group

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Mark your calendar

Oct. 21
Social Security:
Timing Is Everything

Nov. 4
The 4 Truths of
Extended Care

Nov. 5
Women, Wealth, and Wisdom

Nov. 5
Leaving a Thriving Legacy



Newberry College sports teams who were awarded Canopy Financial Group–Thrivent Community Service Team of the Week

Deepening the roots of service

We're proud to continue our team's partnership with Newberry College and recognize the many ways students give back to their community. From volunteering in local classrooms and hosting youth sports clinics to beautification projects across the area, Newberry students consistently make a positive impact and share their stories on the **Newberry College Athletics website** under News and on social media (**@newberrysports**).

Supporting a culture of service and generosity is central to our mission at Canopy Financial Group. Beyond our partnership with Newberry College, we're passionate about helping individuals and organizations reach their giving goals and strengthen the communities they serve. If you have a story about a Thrivent Action Team to share, let us know and we may include it in a future newsletter. Email your story to **canopyfinancialgroup@thrivent.com**.

Growing the community one step at a time

A Charleston organization that recently joined the Thrivent Choice® recipient list is Let's Walk. We wanted to put a spotlight on this organization for its efforts in building community by partnering community members—usually older adults—with trained volunteers to gain companionship while partaking in physical activity through walking. These community members are evaluated by a physical therapist and given a personalized walking plan as a free service

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to all who qualify.

This gives members an opportunity to be in a safe and supportive environment to exercise and create meaningful connections. Founder and Director Lynn McCollum-Lasher was a home care physical therapist for 25 years, where she witnessed readmissions due to a lack of activity. Because of this continued experience, Lynn wanted to create a space to encourage and support mobility.



If you haven't directed your available Choice Dollars® yet this year, consider sending them to Let's Walk. It only takes a minute or two at **thrivent.com/choice**. Reminder: 2026 Choice Dollars must be directed by Dec. 31. To get involved with Let's Walk as a volunteer or client, visit **letswalk.us**.

Branching out: Meet our interns

We believe that the work we do and how we do it is unique. We seek out interns to add to our ability to serve, and to instill and pass on a culture of hard work for the benefit of our clients, members, and community. With this in mind, we're excited to introduce you to our two interns.



Meet Office Professional Celeste Welch

A 2027 senior marketing major at Newberry College, Celeste plans to use her previous internships and marketing expertise to help elevate Canopy Financial Group's visibility to a new level. We're thrilled about what Celeste will be able to help us create. She's delighted to be a part of Canopy Financial Group and help work toward the team's goal of putting people in a place to live generously. She chose Canopy Financial Group because of its love for giving back and its care for the Newberry community. Fun fact: Celeste was born on a military base in England.



Meet Office Professional Alicia Martin

A 2027 senior accounting and business administration major at Newberry College, Alicia has been in the Air Force Reserves for 11 years. She wanted a job she could enjoy while putting her love for helping other people at the forefront of her work, and she found Canopy Financial Group to be the best fit to reach those career goals. She is excited to become part of Canopy Financial Group and continue to help communities and families plan for their futures and for when life's unexpected events happen. Fun fact: Alicia can name all the U.S. presidents in order.



Year-end reminders

As the holiday season approaches, don't forget to prepare your end-of-year to-dos. Here are a few simple steps to consider that can help keep you on track with your financial and charitable giving goals before the year comes to a close.

- Confirm beneficiary designations
- Review benefits and contribution rates
- Consider charitable giving opportunities
- Direct any available Choice Dollars before Dec. 31
- Schedule a year-end review

Exciting upgrades to Thrivent Choice



Thrivent Choice is a generosity program that reflects the heart of Thrivent—empowering clients with membership to have a voice in how Thrivent distributes millions in grant funding each year. Since 2010, members like you have helped Thrivent distribute more than $660 million to nonprofit organizations and churches nationwide.

Good news!
We're excited to share upgrades that make the program simpler, more flexible and available to more members:

Choice Dollars are now designated once per year, in full, based on the prior year's qualifying product activity. Members have the entire year—through Dec. 31—to direct Choice Dollars to the enrolled nonprofits and causes you care about. This gives you the flexibility to direct Choice Dollars anytime throughout the year—on your schedule and in support of what matters most to you.

All 2026 Choice Dollars are assigned. Designate them before Dec. 31 to make the biggest impact. Access to the program has also expanded. All Thrivent members are now eligible to receive Choice Dollars, more than doubling the number of members who can participate. Whether you're a longtime user or newly eligible, you now have even more opportunities to make a meaningful impact. Don't wait—direct **Choice Dollars** today.

Direct now

Harvest the season: Apple Pie Cupcakes

*Want to jump into fall but don't know where to start? Begin with this apple cinnamon pie cupcake recipe from **Taste of Home** that everyone will rave about! With just a few ingredients, you can make an amazing fall treat.*

Cupcake ingredients:

1 package yellow cake mix (regular size)
2 tablespoons butter
4 medium tart apples, peeled and finely chopped (about 4 cups)
¾ cup packed brown sugar
1 tablespoon cornstarch
1 tablespoon water

Frosting ingredients:

1 cup butter, softened
3 cups confectioners' sugar
2 tablespoons heavy whipping cream
1 teaspoon vanilla extract
1½ teaspoons ground cinnamon
Thinly sliced apples, optional

Directions:

1. Prepare and bake cake mix according to package directions for 24 cupcakes; cool cupcakes completely.
2. In a large skillet, heat butter over medium heat. Add apples and brown sugar; cook and stir until apples are tender, 10–12 minutes. In a small bowl, mix cornstarch and water until smooth; stir into pan. Bring to a boil; cook and stir until thickened, 1–2 minutes. Remove from heat; cool completely.
3. Using a paring knife, cut a 1-inch-wide cone-shaped piece from the top of each cupcake; discard removed portion. Fill cavity with apple mixture.
4. In a large bowl, combine the five frosting ingredients; beat until smooth. Frost the cupcakes. If desired, top with apple slices to serve.

Variations:

- Add a caramel drizzle.
- Mix chopped pecans or walnuts into the apple filling to give an added crunch.
- Add a pinch of nutmeg or allspice to the apple filling mixture for a more complex flavor.
- Make a cream cheese frosting instead of the cinnamon frosting.

Upcoming events

Social Security: Timing Is Everything



Wednesday, October 21 at noon–12:30 p.m. and at 4:30–5 p.m. | Virtual event

Social Security is a vital income source for many retirees. But it can be a confusing topic, and making the most of it can have a lot to do with timing it right. This workshop can help you get answers to your questions and learn what Social Security can mean for you. Learn from Leander McGuigan, a financial advisor with Canopy Financial Group. Bring your questions and leave with greater confidence about your options. **Click here** to register.

The 4 Truths of Extended Care

Wednesday, November 4

Learn 4 Truths of Extended Care

With a strategy, you can let your family care about you rather than for you.

If you're thinking "it won't happen to me" when it comes to needing help as you age, you aren't alone. But the need for care often comes anyway. Attend this workshop to learn how best to prepare for the kind of care you want.

- Understand what extended care is (and isn't)
- Look at where extended care is received
- See the personal and financial costs of care
- Explore options for your extended care strategy

This event will be held via Zoom on November 4 at 12 p.m. and 4:30 p.m. and is hosted by Canopy Financial Group.

Please call 803-768-4696 or email **canopyfinancialgroup@thrivent.com** to reserve a place for yourself and a guest.

No products will be sold at this event. If requested, a licensed insurance agent/producer may contact you and financial solutions, including insurance, may be solicited. Long-term care insurance may not cover all of the costs associated with long-term care. You are advised to review your contract carefully. The contract has exclusions, limitations, and terms under which the benefits may be reduced, or the contract may be discontinued. For costs and complete details of coverage, contact your licensed insurance agent/producer. THRIVENT IS THE MARKETING NAME FOR THRIVENT FINANCIAL FOR LUTHERANS. Insurance products issued by Thrivent, Appleton, WI. Not available in all states. Licensed agent/producer of Thrivent. Thrivent.com/disclosures. Insurance products, securities and investment advisory services are provided by appropriately appointed and licensed financial advisors and professionals. Only individuals who are financial advisors are credentialed to provide investment advisory services. Visit Thrivent.com or FINRA's BrokerCheck for more information about our financial advisors. ICC25 31525N N10-25

Women, Wealth, and Wisdom: Charleston



Thursday, November 5 at 6–7:30 p.m. | Brew, 7000 Bowen Pier Dr., Ste. 1, Hanahan, SC

Hear stories about women who have figured out a few things about their finances—and enriched their lives in ways beyond their bank accounts. Learn to apply real-world lessons about managing finances and reaching financial goals regarding the five phases of an IRA. Attend this workshop to 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. Registration information coming soon.

Leaving a Thriving Legacy



Thursday, November 5 at 1 p.m. | Virtual event

Join us for a special educational event featuring guest speaker Eric W. Bilger, FIC, Financial Advisor at Thrivent. Eric will share valuable strategies to help you better prepare for life's "what-ifs." This event is designed specifically for our clients and their adult beneficiaries, offering guidance and support for those navigating concerns about aging parents. We encourage you to invite any—or all—of your beneficiaries to attend. Click here to **register**.

No products will be sold. Thrivent and its financial advisors and professionals do not provide legal, accounting, or tax advice. Consult your attorney or tax professional. See Thrivent.com/social for additional disclosures. 31374FB N12-25

Meet our team

Financial Advisor Robert Kopp (Newberry)
Financial Advisor Travis Goodman (Chapin)
Financial Advisor Sherry Sheppard (Summerville)
Financial Advisor Leander McGuigan (Summerville)
Financial Advisor Anna Jones (Northeast Columbia)

Office Professional Kimberly Goodman
Insurance Office Professional Kendall Francis
Office Professional Alicia Martin
Office Professional Celeste Welch
Office Professional Samantha Snyder

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

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Brandon Matthews; A Licensed Medicare Agent/Broker with Murdock Insurance Group is not affiliated with or endorsed by Thrivent. The views expressed in this presentation by Brandon Matthews are his own and not necessarily those of Thrivent or its affiliates.

Thrivent Choice is a fraternal activity that gives clients with membership a voice in Thrivent's charitable giving. While members recommend organizations to receive funding, Thrivent maintains final authority over all charitable distributions. By participating, you agree to the program's Terms and Conditions available at thrivent.com/thriventchoice.

Thrivent financial advisors and professionals have general knowledge of the Social Security tenets. For complete details on your situation, contact the Social Security Administration.

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