

Financial Foliage

Quarterly Newsletter

Spring 2026

Canopy Financial Group

803-768-4696

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

Mark your calendar

April 18

Thrivent Day with Newberry College Baseball (see details on pg. 3)

May 10

Mother's Day

May 12

Your Legacy: Family, Church and Charity workshop (see details on pg. 3)

May 21

Your Legacy: Family, Church and Charity and College Planning 101 workshops (see details on pg. 3)

May 25

Memorial Day (offices are closed)

June 19

Juneteenth (offices are closed)

June 21

Father's Day



AN OFFICE UPDATE

Here we grow again!

We are excited to announce an addition to Canopy Financial Group: Financial Advisor Anna Jones!

Anna brings a deep heart for service and a strong foundation in holistic financial planning to the Canopy Financial Group team. With over a decade of experience in organizational management, Anna saw firsthand how financial stress can impact individuals and families—fueling her passion to help people find clarity, stability and confidence in their financial lives.

As a financial advisor who specializes in divorce planning, Anna helps clients navigate life transitions with care and confidence. She also leads the Columbia, South Carolina location, partnering with individuals and families to build dedicated plans that support what matters most—both today and in the years ahead.

We are glad to share Anna's expertise and insight with the team's existing clients and have access to such an important divorce planning resource in a challenging and important time of need. Join us in welcoming Anna on our social media pages.

Thrivent went to the zoo

On Saturday, March 14, more than 100 Thrivent clients in the midlands and throughout South Carolina met at the Riverbanks Zoo in Columbia for a day of fellowship, updates and fun. For those who were able to join us, we loved seeing you outside of the office with your families. One of our goals at Canopy Financial Group is to build relationships with each of our clients to help ensure we can provide you with the services and support you need in real time.



Thrivent Financial Advisors (left to right): Robert Kopp, Meredith Wilson, Anna Jones and Leander McGuigan

Thank you for allowing us to support you and your families day in and day out. We can't wait to see what else we can accomplish!

Generosity in action

Canopy Financial Group team impact in 2025

We are so excited to share the impact our clients have had in 2025. Last year, there were 409 Thrivent Choice® participants, 258 Thrivent Action Teams and 20,795 service hours volunteered through Thrivent Action Teams, Thrivent Community events and more.

With your help, the total financial impact was \$1,828,929, resulting from directing Choice Dollars®, personal donations, Thrivent Action Team funds raised, charitable and Thrivent Community events funds raised, Thrivent Charitable grants, Thrivent Action Team seed funds, and the value of volunteer hours.

Thrivent Choice is now easier and more impactful
Choice Dollars are now designated at the beginning

of the year, in full, based on the prior year’s qualifying product activity. 2026 Choice Dollars are now available, and members have the entire year—through Dec. 31—to direct them to a cause they care about. Plus, all Thrivent members are now eligible to direct Choice Dollars, more than doubling the number of people who can participate.

Share your Thrivent Action Team stories

The Canopy Financial Group wants to celebrate with you and share the specific projects you are bringing to your communities. Please tell us about the Thrivent Action Team projects you completed in 2025—and what you have planned for 2026. Send details and photos to canopyfinancialgroup@thrivent.com and be featured in our next newsletter!

2025 IMPACT

Canopy Financial Group

CLIENT & COMMUNITY IMPACT

409

Thrivent Choice® participants

2,351

Thrivent Action Team leaders & volunteers

EVENT IMPACT

1,830

Financial, charitable & Thrivent Community event participants

258

Thrivent Action Teams

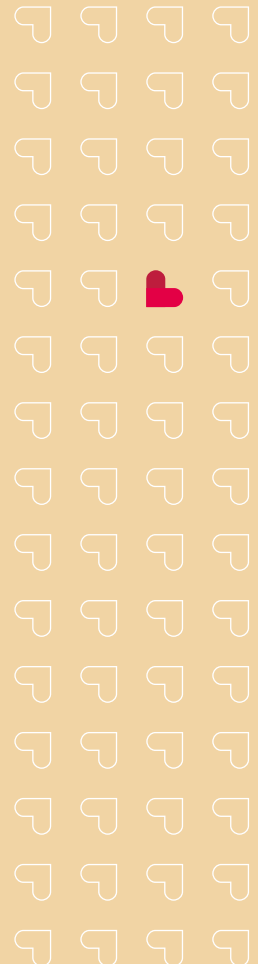
20,795

Thrivent Action Team, charitable and Thrivent Community event volunteer hours

FINANCIAL IMPACT

\$1,828,929

Thrivent Choice Dollars® directed, online personal donations, Thrivent Action Team funds raised, charitable and Thrivent Community events funds raised, Thrivent Charitable grants, Thrivent Action Team seed funds and total value of volunteer hours





Upcoming events



Thrivent Day with Newberry College Baseball

Saturday, April 18 | 1 p.m. – Game 1 and 4 p.m. – Game 2
Newberry College Baseball Field, 1900 Smith Rd., Newberry, SC 29108

Join us on Saturday, April 18, at the Smith Road Complex Baseball Stadium for an afternoon of baseball, fellowship and fun. Newberry College Wolves Baseball will be playing in a double header in conference play against Catawba College. Tickets will be good for both games, which are scheduled for 1 p.m. and 4 p.m.

Help us stock the Wolves Pantry on the Newberry College Campus as they head into the summer terms. The Wolves Pantry was started in 2022 to help tackle food insecurity for students. We will be collecting shelf stable food items and hygiene products. **Reserve your spot today.** Go Wolves!



Your Legacy: Family, Church and Charity

Tuesday, May 12, at 11 a.m. and Thursday, May 21, at 6 p.m.
1108 Harrington St., Newberry, SC 29108

Learn how you can provide for your loved ones, your church and your community's future, according to your legacy plan. Find more information about this workshop on our Canopy Financial Group website at connect.thrivent.com/canopy-financial-group/events.

- May 12 workshop—[Register here](#)
- May 21 workshop—[Register here](#)



College Planning 101 Workshop

Thursday, May 21 | 4–5 p.m. and 6–7 p.m.
Amenity Center, 1600 Crossbill Trl., Hanahan, SC 29410

Parents of college-bound teens are invited to College Planning 101, a complimentary workshop to help you and your student plan to find the right school and pay for it too. The value of a college education is more than greater earning potential. Get practical ways to cut college costs and keep debt manageable. This session is hosted by Leander McGuigan. Refreshments will be served.

Please call 843-879-4596 or email leander.mcguigan@thrivent.com to reserve a space for you and your guest.

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 (Columbia)
 Insurance Support Associate Samantha Snyder
 Office Manager 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 below.

Website

connect.thrivent.com/canopy-financial-group
 Robert: connect.thrivent.com/robert-kopp
 Travis: connect.thrivent.com/travis-goodman
 Jordan: connect.thrivent.com/jordan-sweetenburg
 Sherry: connect.thrivent.com/sherry-sheppard
 Leander: connect.thrivent.com/leander-mcguigan
 Anna: connect.thrivent.com/anna-jones

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 Anna: facebook.com/annajones.thrivent

Instagram

Thrivent: [@thrivent](https://instagram.com/thrivent)
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 Robert: [@robert.kopp.thrivent](https://instagram.com/robert.kopp.thrivent)
 Travis: [@travis.goodman.thrivent](https://instagram.com/travis.goodman.thrivent)

LinkedIn

Robert: [in rokopp](https://linkedin.com/in/rokopp)
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 Jordan: [in jordan-sweetenburg-695042239](https://linkedin.com/in/jordan-sweetenburg-695042239)
 Sherry: [in sherrysheppardthrivent](https://linkedin.com/in/sherrysheppardthrivent)
 Leander: [in leandermcguiganthrivent](https://linkedin.com/in/leandermcguiganthrivent)
 Anna: [in annajonesthrivent](https://linkedin.com/in/annajonesthrivent)

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.

Wolves Pantry is not affiliated with or endorsed by Thrivent.

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.

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 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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