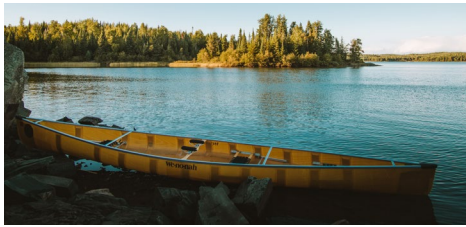


# Quarterly Newsletter

April 2024



## Experienced guidance for life's transitions

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### Our office will be closed

**Friday, May 24**

**Monday, May 27**  
Memorial Day

**Wednesday, June 19**  
Juneteenth

**Thursday–Friday, July 4–5**  
Independence Day

**Friday, August 30**

**Monday, September 2**  
Labor Day

### Meet Daniel Jordan

I was blessed to have lived up and down the east coast during my youth. Most of that time was spent living in Florida where I enjoyed playing football, baseball and swimming. While on the high school swim and dive team, I was captain and experienced and enjoyed a leadership role. That role also taught me it was less about me and more about everyone else. I brought this philosophy along with me throughout everything I have done and experienced. After graduating from high school, I attended a small private aerospace college in Florida. After a change in what I wanted to do in life, I decided to move to Chicago.

During my 10 years in Chicago, I had my first job in the financial services industry as a commercial lines underwriter at a Fortune 100 insurance company. At this time, I became a proud parent of a son, Trevor, and a daughter, Cheyanne. Looking for a different pace of life to raise children, we moved to the Twin Cities. While living in this area, my daughter, Chloe, was born.

During this time, I worked in the operations area of a mutual fund company. Unfortunately, our positions were outsourced to another organization and due to personal reasons, I decided to take on the role as operations manager for a large retail organization. During my tenure, I was able to experience different jobs and leaders that profoundly impacted my leadership style and business acumen.

I moved to Rochester in 2023 after marrying my wife, Cassie, and inheriting my two bonus daughters, Adrian and Elizabeth. Most of my free time is spent with my wife and kids, either going to visit them at college or getting them ready to go to college, attending band events or lacrosse. We are active participants in our church community and Cassie is a youth leader. We donate our time and resources to numerous charitable organizations throughout the local area. In addition, I am a huge advocate for autism awareness as my oldest, Trevor, has severe autism.



When we are not spending time at the kids' events, Cassie and I enjoy traveling and eating at new locations. To relax, I enjoy watching most anything sci-fi, playing video games, doing DIY projects around the house and being outdoors during fall.

# Upcoming events

All webinars are held via Zoom. Once you RSVP for the webinar, you will receive the Zoom information. Your family, friends and colleagues may also join you at your location or via the login information.

[Register now](#)

**No products will be sold at these events.**

**Questions?** Please contact us at [emeraldfinancialgroup@thrivent.com](mailto:emeraldfinancialgroup@thrivent.com) or 507-289-1682.

24  
April

## 2024 Economic Update with Financial Consultant, Eric Funk

**Wednesday, April 24 at 10 a.m. and 6 p.m.**

**Zoom**

Financial topics seem to make the news every day. Should the headlines you see influence the decisions you make regarding your financial strategy? Find out how to use the latest economic data to help you make informed decisions about your money.

We look forward to sharing information with you.

### Grateful, thankful and blessed

A lot happens around the kitchen table. It is where 38 years ago I was called to many meaningful years with Thrivent, as you placed your trust in me. These years have blessed me with so many wonderful moments to serve; to have caring conversations with clients, colleagues and faith communities about financial stewardship; and to meet and get to know many amazing individuals living out their faith and making a difference.

“

Often when you think you are at the end of something, you are at the beginning of something else.

—Fred Rogers

I am humbled by the work I have been blessed to do and the trust you have placed in me. I can truly say it has been an amazing journey.



And so, the time has come ... not an end or beginning, but a transition that will take me where I am meant to go. I may be retiring from work, but not from life. I look back with satisfaction and look ahead with anticipation.

Grateful, thankful and blessed,  
Scott Bingham

## God's plan: Adam Holtz

In 2011, Colin and Eric took a chance on a guy who had no professional experience in the financial services industry and had just been laid off from selling steel and sheet metal two months before. Of course, that guy was me; I was hired as an office professional. But in 12 years with Emerald Financial Group, I've grown into other roles like financial planning analyst, director of investment management, director of financial planning and, currently, director of operations.

I always endeavor to do everything I can for you, our clients. Even if I haven't met many of you in person, I've spoken to most of you on the phone and those of you whom I have met have always shown me why our team does what we do—our clients are really some of the best people out there. You care tremendously about giving back with the blessings you've received: sharing with the community, leaving a legacy with your church or favorite charity, and passing on your blessings to the next generation are only a few of the ways you give back.

For the last couple of years, my family and I have felt a sort of calling to give as well. But it's a giving of a different sort—a giving of ourselves. And so, this newsletter will be the last one that features me as an employee of Emerald Financial Group. I have been accepted to Concordia Theological Seminary in Indiana, where my family will move for the next two years as I study in preparation to enter full-time pastoral ministry. It's a big change for our family, but we believe that God is calling us into this next stage of our life and we're excited to see what He has planned for us in the future.

Colin often jokes with us that "everyone's replaceable" and I am no exception to that. The team is going to be just fine with or without me—and you will continue to be in great hands for years to come.

I have been blessed beyond measure during my time at Emerald Financial Group. In 2011, Kelly and I had no children. Now, we have three. I have worked for the best bosses a person could ask for—Eric and Colin have always encouraged everyone to put family first, take time



whenever you need it for family, and been generous in providing those opportunities for us. I will always be grateful for that. I've worked with 20 different coworkers during my time here and they all have amazed me with their generosity and care for others. Shauna, Annie, Andy, Shauna, Jake, and Dan will continue to round out the best team out there. I'll continue to be an Emerald Financial Group client just like you are.

I will miss the interactions with everyone in our office and I'll miss the southeast Minnesota community, but most of all I will miss you, our clients. Your relationships with our team have made such a difference in the lives of others. Thanks for the memories and God bless!

## Stay connected

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