

# Quarterly Newsletter

Second quarter

April 2025

## Our team



At Fairway Financial, it is our mission for everyone to have a healthy relationship with money. We work towards this by empowering clients to create a legacy of financial wisdom through dependable advice.

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

### North Carolina office

3309 Jaeckle Dr., Ste. 110  
Wilmington, NC 28403

### Tennessee office

2109 W. Emory Rd., St. 105  
Powell, TN 37849

## Leave all you can to those you love

Want to leave as much as possible to the people and organizations you love? With careful planning, you can.

A wisely crafted strategy can help you transfer your assets in a tax-efficient manner, allowing your beneficiaries to receive more of what you pass down. Plus, it can help alleviate complex legal situations and confusion for the people you care about most.

It's important to look at your financial plan from multiple angles. Take time to understand your options and the tax implications of each scenario. We can help you explore:

- Leaving your assets directly to your beneficiaries.
- Transferring resources to your favorite charitable organizations.
- Using required minimum distributions to fund an income tax-free life insurance benefit for your heirs.
- Qualified Charitable Distributions from your IRAs.

Together, we can determine the most efficient way to pass down all you can. Contact us to start the conversation.

## Taxes in retirement: A comprehensive guide



Whether you're just beginning to save for retirement or are approaching retirement age, understanding tax-efficient strategies can give you a clearer picture of how much money you'll have to live on and how long your savings will last.

Exploring tax-smart strategies can help minimize what you'll pay in taxes during retirement. [Read this article](#) for more insights, and then let's discuss how to optimize your retirement tax plan.

## Meet the team



**Jeremy Cox**  
FIC  
Financial Advisor  
Tennessee office



**Matthew Beatty**  
FIC, CKA®  
Financial Advisor  
North Carolina office



**Kevin Littlejohn**  
Associate  
North Carolina office



**Jessamin Smith**  
Director of Operations  
Remote



**Will Collins**  
Client Service  
Administrator  
Tennessee office



**Alexis Sorensen**  
Office Professional  
North Carolina office



**Nelly Istomin**  
Office Professional  
Tennessee office

## Looking ahead to an exciting 2025

As we wrap up an incredible 2024, we want to take a moment to express our heartfelt gratitude to all our clients. This year has been one of growth, meaningful connections and exciting milestones for Fairway Financial Group. We couldn't have done it without your confidence and support.

From helping clients navigate financial strategies to organizing impactful events, we've been honored to be part of your journey.

Looking into 2025, we remain dedicated to providing exceptional service, insightful guidance and innovative solutions to help you reach your goals.

We're also thrilled to share that our Knoxville office has relocated to 2109 W. Emory Rd., Powell, Tennessee. We look forward to welcoming you there soon!

Thank you for being part of the Fairway Financial Group family and wishing you a prosperous, fulfilling and successful 2025!

## Success in giving: Our donation event exceeds expectations!

Thanks to the generosity of our communities, Fairway Financial Group and Your Journey Financial Advisors raised more than \$46,000 for Samaritan's Purse to support the relief efforts of Hurricane Helene. Whether you purchased BBQ or just gave a financial donation, your kindness made a real difference. Thank you for coming together to support those in need.



## Stay connected

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**Email:** [fairwayfinancialgroup@thrivent.com](mailto:fairwayfinancialgroup@thrivent.com)

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.

Samaritan's Purse is not affiliated with or endorsed by Thrivent.

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