

Voyage Financial Advisors



What differentiates Voyage Financial Advisors is our common sense purpose, brought to life by uncommon passion. Our team features innovative, knowledgeable and compassionate professionals with a shared vision to help our clients achieve their most important financial goals and dreams.

Financial services

- Free portfolio reviews: asset allocation, diversification and risk analysis.¹
- Comprehensive personalized financial analysis.
- Retirement income strategies.
- Tax-efficiency and charitable gift strategies.
- Estate protection strategies.
- Business retirement plans: 401(k), SIMPLE IRA and SEP, nonqualified plans.
- Dedicated planning for a fee.

Investment management

- Rollovers: IRAs, 401(k), 403(b), 457 Plans, deferred compensation, profit sharing.
- IRAs: Roth, traditional, Roth conversions.
- Managed accounts: fee-based investment advisory services.
- Annuities: immediate and deferred, fixed and variable, fixed indexed annuities.
- Mutual funds.
- Individual stocks, bonds and exchange traded funds (ETFs).
- College funding: 529 Plans, Coverdell and custodial accounts.

Risk management

- Life insurance: term, whole life, universal, variable universal.
- Disability income insurance: long term, short term.



Let's connect



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thrivent.com/voyage



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Verona

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Verona, WI 53593

Marshfield

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Wausau

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Wausau, WI 54401

Neillsville

1031 E. Division St.
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Wisconsin Rapids

3930 Eighth St. S.
Ste. 204
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Office hours

Monday–Thursday 8 a.m. to 4:30 p.m.
Fridays and evenings by appointment.

In addition, phone and Zoom appointments available.

Financial advisors



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Grace Jones, Office Professional
Jacob Lund, Office Professional
Angie Stroik, Office Professional

*Voyage Financial Advisors is a financial services practice of Thrivent.

¹While diversification can help reduce market risk, it does not eliminate it. Diversification does not ensure a profit or protect against loss in a declining market.

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

Thrivent and its financial advisors and professionals do not provide legal, accounting or tax advice. Consult your attorney or tax professional.

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.

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