

Newsletter

Spring/Summer 2024

Our team



Our mission is to help our community make wise decisions with their finances so they can live a life of abundance.

thrivent.com/huntington
huntingtongroup@thrivent.com

626-574-7209

444 E. Huntington Dr., Ste. 102
Arcadia, CA 91006

Monday to Friday: 9 a.m.–5 p.m.

Annual shred event

Saturday, June 1

9 a.m. – Noon

Office parking lot
444 E. Huntington Dr.
Ste. 102
Arcadia, CA 91006

We are excited to offer you the opportunity to safely dispose of documents that you no longer need. Come for the shredding and stay for the fresh tacos and amazing fruit shaved ice—the perfect summer kickoff!

No products will be sold.

Welcome Caley Kelly

We are delighted to announce the newest member of our team, Caley Kelly, who joined the Huntington Group this March as a support associate. With an extensive background in administrative excellence, she brings to the team a passion for organization, stewardship and helping others achieve their goals.

Caley graduated from Vanguard University in Costa Mesa in 2012, spending the past decade honing her skills in building internal support systems for various organizations before coming onboard with Thrivent last year. She is looking forward to complementing her extensive administrative profile with real-world financial advice expertise. Caley's unique perspective prioritizes the client experience, allowing her to create organizational standards that focus on the human connection—building better workflows and stronger relationships at the same time. She'll be working to improve our procedures behind the scenes, as well as meeting with clients to help answer questions and serve your needs directly.

When Caley's not in the office or working from home, she can typically be found trying to keep up with her toddler, Charlotte, alongside her husband, Sean. They spend most weekends exploring local parks, breweries and taco stands, often in the company of her extended family in Orange County. They're gearing up to celebrate Charlotte's second birthday in June, taking advantage of the gorgeous Southern California summer to host an outdoor party full of games, laughter, good food and sunshine.

As we grow here at the Huntington Group, we look ahead to the future with optimism and confidence. Please help us extend a warm welcome to Caley—we are proud to have her join our team!

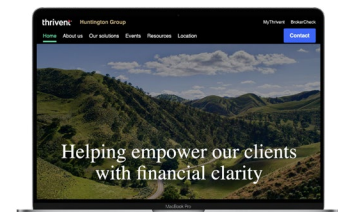


Sean, Charlotte and Caley

Introducing our new website

We're thrilled to announce the launch of our new website. We hope that it will act as a hub for not only information but also events and articles that we find valuable for you. Take a look today and be sure to save it as one of your bookmarks!

thrivent.com/huntington



About our team

The Huntington Group's team-based approach allows you to benefit from the vast experience of our knowledgeable industry professionals. Michelle Busick keeps processes running smoothly by managing the daily business operations and can help you schedule your next appointment. The Huntington Group's advisors, Isaac Taylor, Tony Valazza, Parker Olson and Caley Kelly work together to provide valued clients with comprehensive and personalized financial solutions. Parker and Caley help clients with transactions, paperwork, and simple planning. While Isaac and Tony deliver their advanced planning expertise.



Isaac Taylor
Financial Advisor



Anthony Valazza
ChFC®, CLU®, CASL®,
LUTCF®, FIC
Associate



Parker Olson
Associate



Michelle Busick
Office Professional



Caley Kelly
Associate

Isaac's corner

Life in the Taylor household has been ever-changing as our son continues to grow. Boaz turned 1 in November and it has been an absolute joy for Kamille and me to watch the miracle of his growth and development. With his first steps and first words behind us, we are excited for future years while also enjoying being present with him in each of his exciting phases. For his one-year birthday party we had a fire truck stop by and all the kids got to see the truck up close, meet the firefighters and take pictures, which was a ton of fun. Thanks to the Pasadena Fire Department for doing that. We also had tacos and shaved ice and will have the same tacos and shaved ice at our shred event coming up. We are looking forward to seeing many of you there.

Kamille has been continuing to grow her business and has expanded into a new office in Sierra Madre, which has a beautiful view of the mountains. We both have commutes of less than 10 minutes, which is a blessing in Los Angeles and makes it easier for us to grab lunch together on days when our lunch times line up.

If you have been to our office in person recently, you may have noticed a bit of a new look with a hybrid race theme from the "old school" horse racing to the "new school" Formula One racing decorations. From race-used pieces of F1 cars to signed race suits, our office seems a bit more vibrant with McLaren Papaya colors on the walls.

Tony's corner

I'm settling into my new role and working a reduced schedule, which allows me to enjoy some extra time off. My neck surgery recovery is coming along, but slower than I expected. I'm looking forward to the time when I can get back into some mountain biking and long term, hopefully rowing again. I'm also looking ahead to

my son getting married in early August, an answer to 32 years of prayer. I still love putting time into the racetrack chaplaincy and serving the workers, trainer and jockeys at Santa Anita Park. God is good and I'm thankful for all my clients, friends and family. Looking forward to a great year!