The Pinnacle Wealth Management Group is a team of experienced financial professionals focused on helping clients build holistic strategies that reflect their unique values and beliefs. Our team serves communities across the state of Wisconsin with offices in Antigo, Onalaska and Pulaski.

Team based approach

Financial services

- Portfolio reviews: asset allocation, diversification and risk analysis[1]
- Personalized financial analysis
- Retirement income accumulation and distribution strategies
- Tax-efficiency and charitable gift strategies
- Estate and legacy strategies
- Business retirement plans: 401(k), SIMPLE IRA and SEP, nonqualified plans

Investment management

- Rollovers: IRAs, 401(k), 403(b), 457 Plans, deferred compensation, profit sharing
- IRAs: Roth, traditional, Roth conversions
- Managed accounts
- 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

Dedicated planning services (for a fee)

Pinnacle Wealth Management Group

Antigo Office
815 Superior St.
Antigo, WI 54409
O 715-623-5279

Pulaski Office
945 E. Glenbrook Dr.
Pulaski, WI 54162
O 715-623-5279

Onalaska Office
1613 Main St. Ste. 207
Onalaska, WI 54650
O 920-279-8088

connect.thrivent.com/pinnacle-wealth-management-group
facebook.com/thrivent.pinnacleteam
F 877 206 1873

Office hours
Monday–Thursday 8 a.m. to 4:30 p.m.
Friday 9 a.m. to 1 p.m.
Evenings and weekends by appointment.
Phone and Zoom appointments available.

Financial professionals

Travis Rose, CEPA, CLTC®, FIC,
Financial Consultant
travis.rose@thrivent.com
connect.thrivent.com/travis-rose

Following his time as a Special Operations sniper team leader in the Army, Travis partnered with Jean Greening to form what is now the Pinnacle Wealth Management Group. His focus is on helping businesses build effective strategies in the areas of employee retention, ownership transition, etc. as well as creating tax efficient strategic dedicated plans for business owners and families. Travis and his wife, Sara, have five daughters and one son and are integral in their church.

Scott J. Greening, CFP®, FIC
Wealth Advisor
scott.greening@thrivent.com
connect.thrivent.com/scott-greening

Scott came onto the Pinnacle Wealth Management Group in 2021 with a specialized focus on investment management. Drawing from years of experience leading an investment committee, Scott designs portfolios by targeting an appropriate blend of growth and stability suitable for each client. He and his wife, Caitlin, enjoy chasing around their son, Thomas, traveling, being with family and spending time outdoors with their chocolate lab, Millie.

Daniel P. Bekx, FIC
Financial Associate
dan.bekx@thrivent.com
connect.thrivent.com/dan-bekx

Dan began his Thrivent career in 2008 with the ambition of helping individuals be wise with what they've been given and set goals that reflect their values. To further carry out that mission, Dan transitioned from his role at Thrivent's home office to join the Pinnacle Wealth Management Group in 2022 where he works directly with clients and supports the team's overall insurance planning. Away from work, Dan enjoys family time at the cottage with his wife and son, playing guitar and piano, and serving his community through volunteering.

Jeffrey T. Breit, RICP®
Financial Associate
jeff.breit@thrivent.com
connect.thrivent.com/jeff-breit

Jeff joined Thrivent in 2015 as a regional development director leading the southwest region of Wisconsin. In 2021, he made the decision to join the Pinnacle Wealth Management Group, where he leads the team's new business growth and member service strategies. Jeff lives in La Crosse, Wisconsin, with his wife, Traci, and their two children, Thomas and Madi.

Support staff

Anne Nowak, Practice Support Associate
anne.nowak@thrivent.com

Anne joined Pinnacle Wealth Management Group in 2019 after working for Thrivent's corporate office for 10 years. Her primary focus is supporting the team's overall investment operations, including new account opening, servicing the needs of current clients and many other areas. Anne enjoys spending time with her husband, Ben, and six children (three humans, a dog and two cats). In their downtime they enjoy board games, volunteering at local cat rescues and crafting.

Ashley Hable, Office Professional
ashley.hable@thrivent.com

Ashley started with the Pinnacle Wealth Management Group in 2020 supporting the team with scheduling appointments, preparing client communications, overseeing office operations and organizing events within the community. Her diligent work ethic has led to Ashley's growth and development where she now supports many areas within the team's financial planning operations. Ashley loves spending time with her family and dog, Tryxie, going to concerts, camping and kayaking.

[1]While 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.