

Legacy Wealth Advisors

1645 Lyndale Ave.
Faribault, MN 55021

Office hours:

8:30 a.m. to 4:30 p.m.
Monday–Thursday

8:30 a.m. to 12:30 p.m.
Friday



Jen Becker
Wealth Advisor
Legacy Wealth Advisors
507-384-3186
jen.becker@thrivent.com

Stay connected

[connect.thrivent.com/
legacy-wealth-advisors](https://connect.thrivent.com/legacy-wealth-advisors)

Our Mission

We strive to deliver an exceptional and personalized client experience as we guide you on your financial journey. With unwavering dedication and passion, we help guide you toward achieving lasting financial freedom and building a legacy that reflects your values.



From left to right: Office Professional Pam Condon, Wealth Advisor Jen Becker, Practice Support Associate Amy Erkenbrack, Office Professional Steven Mittadam

What is a tax deduction and how does it work?

One of the best ways you can trim your tax bill is to develop a deeper understanding of the system—and that includes tax deductions. Being aware of how tax deductions work and what kinds might be available to you can be a big advantage when it comes time to file.

The amount of federal or state income tax you pay is based on the amount you earn throughout the year. Tax deductions—sometimes known as write-offs—are provisions that allow you to reduce the amount of your income that's taxable. That, in turn, reduces the total amount of tax you owe.

To claim a particular deduction, you must have incurred an eligible expense. Several types of deductions are possible, including those for contributing to health savings accounts, paying mortgage interest or running a small business. Depending on your circumstances, you may qualify for many deductions or none at all. This is where having some background knowledge on the topic, as well as working with a qualified tax professional, can help you get the most from your tax strategy. Read [this helpful article](#) from Thrivent to learn more now.

TEAM MEMBER HIGHLIGHT

Amy Erkenbrack, practice support associate



Although I've been with Thrivent for 11 years, the past year and a half since joining the Legacy Wealth Advisors team has been especially eventful and rewarding. We've hosted several community give-back events and educational workshops, deepening our commitment to service and financial literacy.

I was brought in with the goal of enhancing the experience we provide for our clients to make it more efficient and easier for you. A few of the highlights include refining our process during meetings to incorporate getting any forms signed or applications done right on the spot.

On a lighter note, as I get to know the Faribault community, I had the chance to visit the Furball Farm Cat Sanctuary—home to more than 300 cats! It was a treat for me and especially for my 8-year-old daughter.

There's never a dull moment, and I'm excited for what's ahead ...

RECIPE CORNER

Amy's easy and delicious slow cooker pot roast

Ingredients

- Pot roast
- 1 oz. packet of ranch seasoning mix
- 1 oz. packet of au jus gravy mix
- 1 stick of butter (not margarine)
- 1 medium white onion, sliced

Instructions

Put the roast in your slow cooker and add all the remaining ingredients on top. Cook on low heat for 4-6 hours. You can expect the meat to be fall-off-the-bone tender. Choose to eat the meat as part of your meal or make pulled beef sandwiches—you can't go wrong either way!



BIBLE VERSE I'D LIKE TO SHARE

“Now faith is the assurance of what we hope for and the certainty of what we do not see.”

—Hebrews 11:1

This verse resonates with me as a wonderful reminder that to have faith in God is to be confident in what God has promised for my life. I can follow with obedience the path he has laid out for me because he has designed it only for my good and to prosper me.



Upcoming events

Sept. 11

Feed My Starving Children give back event

Join us as we come together to pack nutritious meals for communities in need. We'll meet at our office in Faribault at 10:45 a.m. and carpool together via charter bus to the packing event in Eagan. Food and drinks will be provided on the bus. Seating is limited, so RSVP today!

Carpooling meet point:

1645 Lyndale Ave, Faribault, MN

Event location: Eagan, MN

11 a.m.-3 p.m.

Call Pam at 507-384-3186 to RSVP by Aug. 29.

Oct. 20

Charitable Strategies to Maximize Impact workshop

This workshop introduces Thrivent Charitable and outlines the benefits of incorporating charitable strategies into an overall financial plan through solutions tailored to your financial circumstances and charitable interests. Learn how a charitable fund works and understand the ways to give.

- Understand the three simple steps to a charitable fund: Give, Grow and Grant
- Learn the difference between Give Now, Give Later, and Give & Receive gifts
- Leave with the concrete steps to get started

Call our office for location details.

6-7:30 p.m.

Pre-registration is required by either calling Pam at 507-384-3186 or texting her at 507-242-8953.

Sept. 29

Murder Mystery Dinner

We're hosting an exciting and interactive murder mystery dinner. Join us to help solve a hilarious mystery while you enjoy a delicious meal. But beware! The culprit is hiding in plain sight somewhere in the room!

Call our office for location details.

6-8 p.m.

Please consider bringing a guest, as this is a fun way to introduce new people to Thrivent. Tickets are limited, so pre-registration is required by calling Pam at 507-384-3186.

Nov. 4

Navigating Decisions for Retirement Success with Dr. Wade Pfau

Start exploring your retirement options today so you can feel confident about the years ahead. Join us for Navigating Decisions for Retirement Success, an exclusive conversation with Dr. Wade Pfau, where you'll learn how mastering retirement income management is one key to making informed decisions that help you navigate the important challenges retirees face.

Virtual Webinar | Noon or 7:30 p.m.

To register for this event, or to receive a recording of it, call Pam at 507-384-3186.

Work anniversaries

Steven Mittadam

July 24 | 2 years

Pam Condon

September 14 | 3 years

We're hiring!

We're hiring an Associate Financial Advisor to join our growing team. This is a great opportunity for someone with 2-3 years of experience who's passionate about values-based financial planning and wants to grow in a collaborative, mission-driven environment. You'll work with financial advisors to deliver thoughtful guidance to clients who care deeply about their families, communities and causes. Ideal candidates will have their FINRA Series 7 and 66 securities licenses and Life and Health Insurance license, and thrive in a team setting. If you or someone you know is ready to help clients plan confidently and live generously, we'd love to hear from you.

Client Appreciation Barbecue

Thank you for those who attended our Client Appreciation Barbecue and brought along food and cash donations to help support the Community Action Center in Faribault. Not only was there a fun camaraderie, but we collected 138 pounds of food and \$65 worth of donations!

If you were not able to make it, we hope to see you at one of our upcoming events.



Prayer wall

If you know someone who is battling a difficult situation and would like to request prayers, please send an email to jen.becker@thrivent.com.

connect.thrivent.com/jen-becker | jen.becker@thrivent.com



ADVICE + INVESTMENTS + INSURANCE + BANKING + GENEROSITY

No products will be sold at these events.

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

Community Action Center and Feed My Starving Children are not affiliated with or endorsed by Thrivent.

Dr. Wade Pfau is not affiliated with or endorsed by Thrivent. The views expressed in this presentation by Dr. Wade Pfau are his own and not necessarily those of Thrivent or its affiliates.

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 Charitable™, the marketing name for Thrivent Charitable Impact & Investing®, is a public charity that serves individuals, organizations and the community through charitable planning, donor-advised funds and endowments. Thrivent Charitable works collaboratively with Thrivent and its financial advisors. It is a separate legal entity from Thrivent, the marketing name for Thrivent Financial for Lutherans.

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. Advisory services available through investment adviser representatives only. Thrivent.com/disclosures.

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