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Abundance Advisor Group News

Quarterly newsletter March 2024

Abundance Advisor Group

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Hours
Monday–Friday
9 a.m. to 5 p.m.

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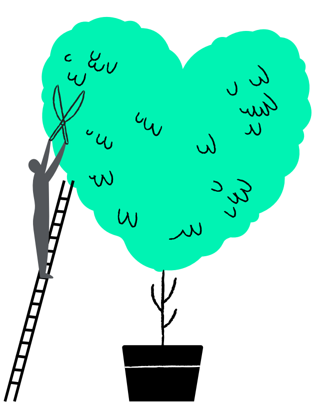

We are delighted to share the latest developments and highlights from Abundance Advisor Group as we approach the second quarter of 2024.

2024 Business Development Conference recap

Annie recently attended Thrivent's largest annual conference. The conference serves as a platform for collaborative discussions on navigating dynamic market landscapes, embracing innovation and fostering sustainable practice growth.

Above: Annie Deluca with several members of the Your Journey Advisors team from Charlotte, North Carolina.

Annie's decision to take time out of her busy schedule to attend is a testament to her dedication, strategic vision and leadership. Invaluable insights and strategies were shared among industry leaders and experts, and we look forward to passing these tools and this knowledge on to our clients.

Annie's leadership continues to inspire our team to deliver unparalleled service and exceed client expectations. Thank you for your continued trust and partnership as we strive to empower you on a financial journey of abundance.

Team member updates

Annie is loving the warmer weather for tennis. Her team competed in the USTA season, once again ending it with the win to become city champions. Annie has since started the ALTA season and participates in a flex league. Besides tennis, she loves to take long walks in the warmer weather.

Mary is getting ready to launch her fourth daughter, Bella, off to college in the fall. They will be doing all the fun senior year things with Bella, including taking a spring break trip to Florida and running on the Greenway as much as possible. In addition, Mary's youngest child, Teddy, will be driving in June. I'm sure a lot of you parents remember having babies … then you blink, and they can drive!

Economy and Capital Markets Update

March 25 | Noon | Virtual

A popular topic of conversation lately is how markets will react during the upcoming election. While there is no “crystal ball,” we do have access to professionals who can provide information about the political landscape’s potential market effects. Join us for our next Economy and Capital Markets Update with Thrivent Regional Investment Consultant Peter McFarlane on March 25 at noon. No need to RSVP, simply **join the Zoom meeting**.

Take advantage of our new tools

Holistic financial planning is our passion, and we are delighted to share some innovative ways we can help you reach your goals. One of our new tools is a more comprehensive retirement and asset software model. It incorporates even more client data and opportunities and shows results on one easy-to-read display.

If you haven’t met with us to take advantage of these resources, please reach out to Mary to schedule an appointment. We have been getting into deep financial planning conversations with some seasoned investors, as well as families just starting out on their journey, and we look forward to meeting with you too.

Stay connected connect.thrivent.com/abundance-advisor-group | abundancegroup@thrivent.com

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