

About Thrivent

How do you think about your long-term goals? When seeking financial guidance, most financial services companies will help you create a plan with the accumulation of money as the end goal. Others aim to help you become financially independent. At Thrivent, we strive to help you achieve financial clarity—because clarity is the first step to achieving all your goals.

Founded on shared beliefs, Thrivent has been helping others live more generous lives while guiding them on their financial path. We are a holistic financial services organization, providing financial advice, investments, insurance, banking and generosity programs to help our clients make the most of all they've been given.

Service you can count on

For more than 100 years, Thrivent has helped people build their financial futures and live more generous lives. Today, we're a Fortune 500 company, offering a full range of expert financial solutions, serving more than 2.3 million clients, as well as the communities in which they live and work.



\$189 billion
assets under
management/
advisement*



Rated by:
AM Best, Moody's Investors Service
and S&P Global Ratings¹



Serving 2.3
million clients



*Thrivent was named one of
the "World's Most Ethical
Companies" by the Ethisphere
for 11 years in a row.*

Contact information

For questions and assistance with **In-Force Insurance** contracts, please contact Tony Mason at 518-453-3500, ext. 120 or tony.mason@thrivent.com.

For **Life Insurance and Annuity** service requests, please contact Cathy Quali at 215-230-8488 or cathy.quali@thrivent.com.

For **Mutual Fund and Brokerage** service requests, please contact Adam Jameson at 518-453-3500, ext. 100 or adam.jameson@thrivent.com.

To schedule an appointment with Greg or Bob, please contact Marlene Blattstein at 518-453-3500, ext. 101 or marlene.blattstein@thrivent.com.

To schedule an appointment with Stephen Strand or John Prouty, please contact them directly: stephen.strand@thrivent.com or 860-305-5685 or john.prouty@thrivent.com or 585-208-4365.

*As of Dec. 31, 2021.

¹For information on each rating, visit the individual rating agency's website. Ratings are based on Thrivent's financial strength and claims-paying ability but do not apply to investment product performance.

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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 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.

Insurance products, securities and investment advisory services are provided by appropriately appointed and licensed financial advisors and professionals. Only individuals who are financial advisors are credentialed to provide investment advisory services. Visit Thrivent.com or FINRA's Broker Check for more information about our financial advisors.

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Mengel Morse and Associates



Financial guidance and clarity that spans generations

Mengel Morse and Associates was founded in 2017 by Greg Mengel and Bob Morse, who ran successful practices at Thrivent for more than 20 years. Our combined financial skill sets, backed by a well-rounded team of experienced and caring professionals, allow us to provide a more complete experience for our clients across 35 states, including New York, Pennsylvania, Delaware and Connecticut.

Our commitment is that you are informed and educated at every step of your journey, as we help ensure you have plans in place to protect what matters most, retain more of your assets, and efficiently transfer your wealth.

Let's connect



thrivent.com/mengelmorse

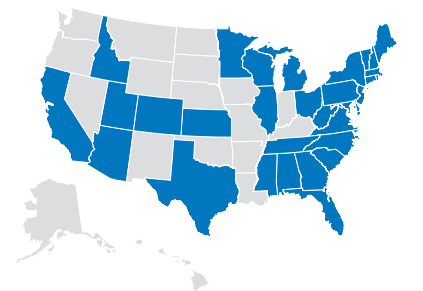


Schenectady office

3418 Carman Rd
Schenectady, NY 12303
518-453-3500
Monday–Friday 9 a.m. to 5 p.m.

Doylestown office

350 South Main St., Ste. 310
Doylestown, PA 18901
215-230-8488
Monday–Thursday 8 a.m. to 4 p.m.



**Our team serves
clients nationally
and is licensed in:**

AL	KS	OH
AZ	MA	PA
CA	MD	RI
CO	ME	SC
CT	MI	TN
DC	MN	TX
DE	MS	UT
FL	NC	VA
GA	NH	VT
ID	NJ	WI
IL	NY	WV

As of June 1, 2022.

How we work together

Our approach goes beyond any one topic. Whether you're seeking guidance on managing wealth you've accumulated or have several financial goals in mind, our advice integrates your objectives into a personalized blueprint that grows and changes with your needs and goals. We develop customized solutions across these key areas:

- Tax planning
- Retirement distribution strategies
- Estate planning
- Investments

We offer a clear and detailed process for evaluating each client and providing customized financial solutions tailored to meet your needs. Our process includes:

- Gathering data about our clients and their goals and objectives.
- Requesting tax returns and account statements from our clients.
- Strategizing based on a thorough analysis of the documents provided and our clients unique situation.
- Meeting with our clients again to present our analysis and recommendations.
- Partnering with our clients through ongoing reviews so that we can adapt to life changes.

Our team



Greg Mengel

MBA, ChFC®, CLU®, FIC
Wealth Advisor
CA Insurance Lic. #0I31022
3418 Carman Rd.
Schenectady, NY 12303

Greg has been with the organization for 20 years and recently qualified for Thrivent's 2022 Hall of Fame.* He spends most of each day helping clients and prospects craft investment, retirement distribution and tax-efficient strategies to work towards a more financially secure retirement. Greg and his wife, Dawn, have two adult children, Marin and Grant. Greg enjoys traveling, reading, attempting to golf and following his beloved Chicago sports teams on TV or in person.



Robert Morse

Financial Consultant
CA Insurance Lic. #0M70439
350 S Main St., Ste. 310
Doylestown, PA 18901

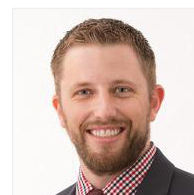
Bob has worked as a Thrivent financial consultant for 28 years and has qualified for Thrivent's 2020 Hall of Fame.* What he enjoys most is the deep relationships he forms with his clients. Bob focuses his work on distribution planning, estate planning, tax analysis, investments and insurance to assist clients in reaching their retirement goals. He and his wife, Lisa, have three adult children, Steven, Ben and Jessica. Bob enjoys traveling, golf, fly fishing and outdoor activities.



Stephen Strand

ChFC®, LUTCF®, FIC, RICP®
Financial Associate
113 Kimberly Dr.
Manchester, CT 06040

Steve has been with Thrivent for 31 years and joined Mengel Morse and Associates in 2020. He recently qualified for Thrivent's 2022 Hall of Fame Legends.** His main interests are traveling with his wife, Karen, walking their dog, Cali, following MLB (go Red Sox) and listening to music. A fun fact about Steve is that he has been to all 50 states.



Tony Mason

FIC
Financial Producer I
2212 Manuela Dr.
Chaska, MN 55318

Tony started his career in the financial services industry with Thrivent in 2007 and has been part of the organization ever since. He enjoys educating people through the complex web of information that makes up their financial foundation, and uses his knowledge to help them save for, protect and achieve their goals. Tony has worked with Thrivent members as both a financial professional and a consultant to financial professionals throughout the country, mainly in the insurance space.



John Prouty

Financial Advisor
123 Hale Haven Dr.
Hilton, NY 14468

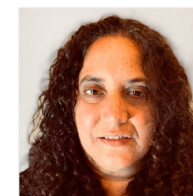
John recently retired from a 35-year career as a chemistry and physics teacher. He is now putting his passion for education to use by helping families gain the best financial knowledge possible for their specific situation. John enjoys working together with clients to develop clarity and security in money decisions.



Adam Jameson

Associate
3418 Carman Rd.
Schenectady, NY 12303

Adam joined Thrivent in 2020 after 30 years with a global chemical manufacturing company. He has been licensed since 2021 and assists clients in the areas of Brokerage and Mutual Funds. Adam has been married to Tracy Murphy since 1994, and they have a son who graduated from college in 2021 and a daughter in high school. He enjoys golf, cooking and professional and amateur theater.



Marlene Blattstein

Office Manager
3418 Carman Rd.
Schenectady, NY 12303

Marlene has worked at Thrivent since 2013. She handles scheduling member appointments and assists with the day-to-day servicing of members' needs. Marlene is married with three children and two Yorkies. She enjoys reading, gardening, volunteering at the Ronald McDonald House, and spending time with family and friends.



Lee Calamaio

Director of Investment Operations
751 E. Capricorn Way
Chandler, AZ 85249

Lee has worked and been licensed at Thrivent since 2008. He is responsible for portfolio research, design, implementation and tracking, plus investment-related client activity. Lee has been married to Nicole since 2001 and has three teenagers, including twin girls. He loves to spend time by any body of water, preferably with a nice boat drink.



Dawn Mengel

Office Professional
3418 Carman Rd.
Schenectady, NY 12303

Dawn has worked at Thrivent since 2006. She manages the marketing program, including workshops, events and social media. Dawn is married to Greg and has two young adult children. She enjoys traveling, reading and relaxing in Cape Cod with her family.



Cathy Quali

Licensed Office Professional
350 S Main St., Ste. 310
Doylestown, PA 18901

Cathy has worked at Thrivent since 2003 and been licensed since 2009. She assists with client needs, is quick to respond and eager to help. Cathy enjoys traveling, hiking and spending time with family and friends.

**Hall of Fame represents long-term commitment to our organization with consistent, successful performance. Financial professionals qualify for Hall of Fame by achieving at least 20 years of service and by meeting performance goals.*

***Hall of Fame Legends represent those Hall of Fame members who continue their dedication to our members since induction. To qualify as a Legend, a financial professional must reach 30 years of service and by meeting performance goals.*