

# Mississippi Valley Associates Connections

Newsletter

Spring 2025

## Mississippi Valley Associates

### **Cedar Rapids Office**

3349 Southgate Ct. S.W.  
Ste. 101  
Cedar Rapids, IA 52404

P: 319-366-2991  
F: 319-366-2891  
Mon.–Fri., 9 a.m.–4 p.m.  
and by appointment

### **DeWitt Office**

908 Sixth Ave.  
DeWitt, IA 52742

P: 563-659-2991  
F: 563-659-2891  
Mon.–Fri., 8:30 a.m.–4:30 p.m.  
and by appointment

### **Geneseo Office**

209 W. Exchange St.  
Geneseo, IL 61254

P: 309-944-4538  
Mon.–Fri., 9 a.m.–5 p.m.  
and by appointment

### **Johnston Office**

5404 N.W. 88th St.  
Johnston, IA 50131

P: 515-494-3477  
Mon.–Fri., 9 a.m.–5 p.m.  
and by appointment



## Your life in six words

Imagine taking on the intriguing challenge of writing a six-word memoir. That's a lot of living to pack into a tiny story. In recent years, some people have found this to be an entertaining endeavor. How about: "Amazed by joy. Strengthened by adversity." Or perhaps: "Planted. Watered. Weeded. Blossomed over time."

Your story and values are part of the legacy you pass along to those important to you. In 2 Timothy 1:5, the Apostle Paul commended his fellow missionary, Timothy, for the legacy of faith handed down from his grandmother and mother that was now sincerely alive in Timothy himself.

At Mississippi Valley Associates, we recognize your story and values are important factors as you plan, make financial decisions and consider your legacy. And if you decide to take a stab at writing your own six-word memoir, we'd love to hear it!

## Build a meaningful legacy

In the oldest piece of Old English literature, Beowulf focused on recounting his valor, recognizing his legacy would be the only thing that would endure after his lifetime. And it did, through his famous heroic poem.

As you consider your legacy, we have resources that can help you plan thoughtfully and with purpose. Check out [thrivent.com/insights/financial-planning/building-a-meaningful-legacy](https://thrivent.com/insights/financial-planning/building-a-meaningful-legacy), to learn why generational wealth is about so much more than money. Plus, you'll get tips for building, sustaining and passing on your wealth.

Mississippi Valley Associates is



committed to helping families by enabling conversations among generations. Consider attending our Prepare Wisely: Estate Strategy Essentials workshop in DeWitt or Cedar Rapids this spring. You can invite your adult children and grandchildren who are beneficiaries to join you in person or online. For details, see the upcoming events section of this newsletter or visit [connect.thrivent.com/mississippi-valley-associates/events](https://connect.thrivent.com/mississippi-valley-associates/events).

# Meet the team



**Alex Carr**  
MBA, FIC  
Financial Advisor  
Cedar Rapids office



**Gaylon Heetland**  
CFP®, ChFC®, CLU®,  
CAP®, CASL®, LUTCF®,  
FIC, CKA®, BFA™  
Associate

DeWitt and Cedar Rapids offices



**Casey Walker**  
CLU®, LUTCF®, FIC  
Financial Consultant  
DeWitt office



**Maurie Nelson**  
LUTCF®, FIC  
Associate  
Geneseo office



**Dillon McBee**  
Associate  
Johnston office



**Bryce Andresen**  
Associate  
Representative  
Cedar Rapids office



**David King**  
Practice Support  
Associate  
Cedar Rapids office



**Allison Thede  
Everman**  
Office Professional  
Cedar Rapids office



**Kallie Barnhart**  
Office Professional  
DeWitt office

**Kathy Drury**  
Office Professional  
DeWitt office



**Teri Burkett**  
Insurance Office  
Professional  
Cedar Rapids office

**TJ Harkins**  
Office Professional  
Cedar Rapids office

**Jo Anne Renfro**

Office Professional  
Remote



## How to keep your farm or business in the family

Here in the heartland, we understand what it means to be able to pass along the family farm or business. Solid guidance is a key component of proper positioning and decision-making, and we are offering complimentary workshops and consultations to help you work toward your goals.

You're invited to our Small Business Solutions breakfast workshop in DeWitt on March 26 or Cedar Rapids on May 13. Or, attend our Prepare Wisely: Estate Strategy Essentials workshop in Cedar Rapids on March 20 or in DeWitt on June 4. Both workshops will also address the unique aspects of planning for the future of your farm or business.

Call our DeWitt office at 563-659-2991 or our Cedar Rapids office at 319-366-2991 for more information or to schedule a consultation.

## Gather a small group for a big cause

We would love to help your small group, family, church or organization host a Take Away Hunger food packaging event. We will provide the equipment, ingredients, logistical support and share the cost of ingredients. Then your team will assemble tasty and nutritious one-pot meals for food banks and disaster relief. You can

decide what project size is right for your group and budget.

Call us at 319-366-2991 or 563-659-2991, or email [teresa.burkett@thrivent.com](mailto:teresa.burkett@thrivent.com), for more information and to reserve a date for this fun and simple-to-organize community service event.



Food packaging in DeWitt



**Two opportunities to make a difference**

**Thrivent Choice Dollars®**

Eligible Thrivent clients with membership can recommend where some of Thrivent’s charitable outreach funds are donated through the Thrivent Choice® program. If you have Choice Dollars available, don’t forget to direct them to your favorite enrolled church or nonprofit organization. **The deadline for directing your 2024 Choice Dollars is March 31, 2025.**

You can easily direct your Choice Dollars online through your Thrivent account. To find out if you have Choice Dollars available or for assistance in directing them, please call our Cedar Rapids office at 319-366-2991 or our DeWitt office at 563-659-2991.

**Wildfire donation match**

The wildfires in California have been devastating for thousands of people. Lives have been lost and rebuilding will cost billions of dollars. If you want to support relief efforts, consider using Thrivent’s online giving platform to make a personal donation. **Through March 10, 2025, Thrivent is offering a \$1 match for every \$2 donated to one of six featured organizations, up to \$500,000\*.**

When you use Thrivent’s online giving platform to make a personal donation, Thrivent pays all the processing fees, so 100% of your donation goes directly to the cause.<sup>1</sup>

To learn about other ways you can help, visit [thrivent.com/about-us/membership/disaster-response](http://thrivent.com/about-us/membership/disaster-response).

**Recipe corner**

**Award-winning chocolate chip cookies**

*“This family-favorite was shared by a college friend of mine who worked in a nursing home kitchen. The staff was challenged to create a soft cookie recipe for the residents, and my friend’s recipe was the winner. I love this recipe because it’s delicious and versatile. You can use a variety of chips (white or dark chocolate, cherry, toffee, peanut butter, etc.) and pudding flavors (vanilla or chocolate) to change things up.*

*The recipe also works well with gluten-free flour. I substitute Bob’s Red Mill All-Purpose Flour cup-for-cup and add a half teaspoon of xanthan gum.”*

—Teri Burkett, Insurance Office Professional



**Ingredients**

- 2¼ cups flour
- 1 teaspoon baking soda
- 1 (3.4-oz.) box instant pudding mix
- 1 cup butter (2 sticks)
- ¼ cup granulated sugar
- ¾ cup brown sugar, packed
- 2 eggs
- 1 teaspoon vanilla
- 2 cups chocolate chips (1 bag)

**Instructions**

1. Preheat oven to 350 degrees Fahrenheit.
2. Prepare the cookie sheets by lining them with parchment paper, if desired.
3. Combine the flour, baking soda and pudding mix in a medium bowl and set aside.
4. Use a mixer to cream the butter with both sugars.
5. Mix in the eggs and vanilla on low speed until incorporated.
6. Add the dry ingredients and mix until combined.
7. Add the chips and stir well.
8. Use a cookie scoop or spoons to drop dough of desired size onto the cookie sheet.
9. Bake for approximately 10 minutes or until the cookies are golden brown. Do not overbake.
10. Let the cookies cool on the sheet for a few minutes before moving them to a cooling rack.



“We will not hide them from their children, but tell to the coming generation the glorious deeds of the LORD, and his might, and the wonders that he has done.”

—Psalm 78:4 ESV



# Upcoming events



## Prepare Wisely: Estate Strategy Essentials

**Thursday, March 20 | 7 to 8 p.m. | Groundswell Event Space, 201 3rd Ave. S.W., Cedar Rapids**

**Wednesday, June 4 | 7 to 8 p.m. | DeWitt Community Library, 917 5th Ave., DeWitt**

Join us for a free dessert buffet and workshop to explore the strategies and tools you can use to make your final wishes clear. Your loved ones will be grateful.

Invite your family and beneficiaries to attend. Those who live outside the area may join online. This event is hosted by Mississippi Valley Thrivent Community. To reserve your spots, please call our office at 319-366-2991 or 563-659-2991, or email [teresa.burkett@thrivent.com](mailto:teresa.burkett@thrivent.com).



## Small Business Solutions

**Wednesday, March 26 | 8 to 9 a.m. | DeWitt Community Library, 917 5th Ave., DeWitt**

**Tuesday, May 13 | 8 to 9 a.m. | The Hotel at Kirkwood Center, 7725 Kirkwood Blvd. S.W., Cedar Rapids**

If you're a business owner, attend our free breakfast workshop to learn about the importance of creating a plan to protect your business, your family and your employees. To sign up, please call our office at 563-659-2991 or 319-366-2991, or email [teresa.burkett@thrivent.com](mailto:teresa.burkett@thrivent.com).



## The Friday Morning Brew

**Friday, March 28 | Friday, April 25 | Friday, May 30 | 7 a.m. to 9 a.m.  
Cedar Rapids office, 3349 Southgate Ct. S.W., Ste. 101**

Stop by our Cedar Rapids office for coffee and donuts. Stay for a friendly chat or just grab and go!

## We are here to support you

Wherever life takes you, we're here to help with your financial needs. Call us to confirm or update your contact information and to request review of your beneficiaries to make sure they are still in line with your wishes.

## Stay connected

W [connect.thrivent.com/mississippi-valley-associates](https://connect.thrivent.com/mississippi-valley-associates)

f [facebook.com/MississippiValleyAssociates](https://facebook.com/MississippiValleyAssociates)

No products will be sold at these events.

Not all team members may office at the above addresses.

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

Take Away Hunger is not affiliated with or endorsed by Thrivent.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

<sup>1</sup>Thrivent will pay up to \$300,000 in online processing fees per calendar year for personal donations made through Thrivent's online giving platform.

<sup>\*</sup>Thrivent will provide a \$1 match for every \$2 donated to one of the organizations listed above. This match will run until the \$500,000 cap is met, or March 10, 2025, whichever comes first. Donations must be made through Thrivent's online giving platform or through a Thrivent Charitable Impact and Investing® Donor Advised Fund. Donations raised through this campaign will go towards the California Wildfires Disaster Response.

The Thrivent Choice® charitable grant program engages Thrivent clients with membership and Thrivent Member Networks in providing grants that support charitable activities, furthering Thrivent's mission and its purposes under state law. All grant decisions, including grant recipients and amounts, are made at the sole discretion of Thrivent. Directing Choice Dollars® is subject to the program's terms and conditions available at [thrivent.com/thriventchoice](https://thrivent.com/thriventchoice).

Member benefits, programs and activities are not guaranteed contractual benefits. You should never purchase or retain any insurance or annuity products simply to be able to participate. Participation is subject to applicable Terms and Conditions.

Thrivent and its financial advisors and professionals do not provide legal, accounting or tax advice. Consult your attorney or tax professional.

Securities and investment advisory services offered through Thrivent Investment Management Inc., a registered investment adviser, member FINRA and SIPC, and a subsidiary of Thrivent, the marketing name for Thrivent Financial for Lutherans. Registered representative of Thrivent Investment Management Inc. Advisory services available through investment adviser representatives only. [Thrivent.com/disclosures](https://thrivent.com/disclosures).