Capitol Region Group Connection

Newsletter Fall 2023

Capitol Region Group Office
71 Raymond Rd.
West Hartford, CT 06107
860-474-3600

Office hours:
9 a.m. to 5 p.m. ET
Monday–Friday

Our mission

To help humanity thrive by empowering clients to achieve financial freedom.

Our vision

To provide best-in-class customized and comprehensive financial planning solutions through education, empowerment and execution.

How we can help you

- Retirement income planning
- Investment guidance
- Legacy/estate strategies
- Tax-efficiency
- Protection strategies
- Education funding strategies

Left to Right: Cindy Clark, Whitney Small, Soren Lancaster, Sam Chang, Kathy Crager and Jordan Brandon. Not Pictured: Jacob Kinney, Bill Bufkins, Jennifer Valliere and Roberta Nichols.

Jim Clouser of Greater Boston Financial Associates joins Capitol Region Group

"We are very excited to welcome Jim and the clients of Greater Boston Financial Associates to Capitol Region Group" lead Wealth Advisor Sam Chang said. "We feel strongly that combining Jim's warmth, passion and client loyalty with our deep expertise across multiple disciplines of financial planning will help produce an exceptional client experience."

Our expanded team will benefit from sharing best practices and being able to serve a greater volume of clients through our multi-faceted financial planning approach. Capitol Region Group prioritizes the financial wellbeing of individuals, families and entrepreneurs alike. We're committed to devising strategies to help Thrivent clients pursue their financial goals through financial guidance, investments, legacy and protection planning, retirement income and tax strategies, generosity and more.

Stay connected

W connect.thrivent.com/capitol-region-group

E capitolregiongroup@thrivent.com

facebook.com/capitolregiongroup.thrivent

linkedin.com/in/samchangthrivent

Meet the team

Sam Chang, Wealth Advisor

Expertise: Investment management

Location: Thrivent Office–Hartford, CT
71 Raymond Rd., West Hartford, CT 06107

860-474-3600

Kathy Crager, Financial Advisor

Expertise: Legacy and protection planning

Location: Thrivent Office–Fort Wayne, IN
3711 Rupp Dr., Fort Wayne, IN 46815

260-255-3040

Jim Clouser, Financial Advisor

Expertise: Financial planning

Location: Thrivent Office–Salem, MA
17 Chanelle Cir., Salem, MA 01970

781-577-2181

Soren Lancaster[1], Financial Advisor

Expertise: Retirement income and tax planning

Hannah Magrum[2], Financial Advisor

Expertise: Special needs planning

Bill Bufkins[3], Associate Financial Advisor

Expertise: College planning

Jacob Kinney, Financial Associate

Expertise: Long-term care planning

Jordan Brandon[4], Associate

Expertise: Financial planning

Jennifer Valliere[5], Financial Associate

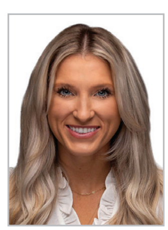
Expertise: Financial planning

Cindy Clark, Office Professional

Expertise: Client care

Roberta Nichols, Office Professional

Expertise: Client care



Whitney Small, Office Professional

Expertise: Digital marketing integration

[1] Although Soren is not a member of Capitol Region Group, he partners with the team with estate planning joint field work. To learn more about Soren, please visit his website at connect.thrivent.com/soren-lancaster.
[2] Although Hannah is not a member of Capitol Region Group, he partners with the team with special needs planning joint field work. To learn more about Hannah, please visit her website at connect.thrivent.com/hannah-magrum.
[3] Although Bill is not a member of Capitol Region Group, he partners with the team with college planning joint field work. To learn more about Bill, please visit his website at connect.thrivent.com/william-bufkins.
[4] Although Jordan is not a member of Capitol Region Group, he partners with the team offering his specialized guidance to clients seeking wealth accumulation. To learn more about Jordan, please visit his website at connect.thrivent.com/jordan-brandon.
[5] Although Jennifer is not a member of Capitol Region Group, she partners with the team offering her specialized guidance to clients seeking wealth accumulation. To learn more about Jennifer, please visit her website at connect.thrivent.com/jennifer-valliere.

Get to know Kathy Crager

As a Capitol Region Group financial advisor, Kathy Crager fulfills her passion for helping clients navigate their financial journey across various life stages. She particularly enjoys connecting with clients and learning more about their families and background. "We come from all walks of life and are more alike than we are different," Kathy said. She feels driven to be intentional and offers financial advice geared toward each client's unique situation.

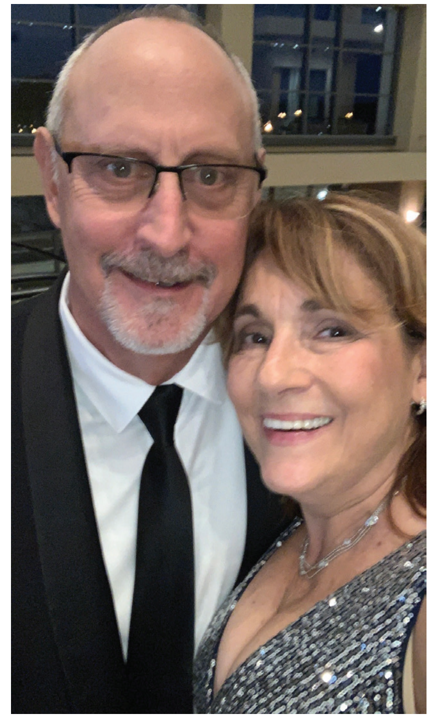
"At Capitol Region Group, we have a multitude of strengths," Kathy added. "And as our team grows, we learn to lean on one another's strengths and become stronger together as we strive to optimize the service provided to our clients."

Kathy is happily married to Brian, her husband of 25 years, and they have two children, daughter Madelyn (age 22), and son Morgan (age 14). Madelyn and her husband, Caleb, have one son, Jackson (age 2), with a second baby arriving in the spring.

Kathy and her husband reside in the very northeastern corner of Indiana, in the middle of a corn field that once belonged to her grandfather. Above all, the Crager family cherishes spending time with one another.

"We feel blessed that our daughter and her family are only 15 minutes up the road," Kathy said. "We have Sunday dinner together and enjoy riding four-wheelers and dirt bikes as a family. We travel to places where everyone can ride and enjoy nature."

Client spotlight: Don and Cathy Mann



Q. What were their careers before retirement?

A. Don and Cathy met in 2017, with their careers being the first noted connection. Don was a neuroscientist and director of clinical development on his way to Italy to meet with epileptologists involved in his clinical study for patients ages four and younger with epilepsy. Little did he know, for more than 15 years, Cathy had been coordinating the registration process for the American Epilepsy Society meeting he was traveling to attend.

In 2018, Don and Cathy went to the American Epilepsy Society meeting together for Don's final presentation on the success of his clinical study findings. Don retired in 2019, and the happy couple joined forces in retirement and marriage.

Q. What constitutes a "perfect" day?

A. A perfect day is spent together at their home by the water, barbequing with family. They also enjoy traveling in their RV, riding e-bikes on trails and watching the waves roll in at the beach. Every day is a perfect day together.

Recipe

Looking for some autumn meal inspiration? Give this hearty pot roast a try:

howsweeteats.com/2020/10/cider-braised-pot-roast

Upcoming events

October

Economic Update Workshop
Monday, October 23
Noon to 1 p.m. ET
Virtual

November

Team Introduction Event
Sunday, November 5
4 to 7 p.m. ET
Spinelli's Function Facility,
10 Newbury St., Peabody, MA 01960

Holiday Wine Pairing Perfection
Wednesday, November 29
6 to 8 p.m. ET
Virtual

Important dates

Friday, November 10
Veterans Day

Thursday, November 23
Thanksgiving Day

Monday, December 25
Christmas Day

Questions? Please don't hesitate to reach out to Office Professional Cindy Clark at 959-230-0055.

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