Purpose Driven Wealth

Team philosophy

Our culture tells us that happiness comes from what we have. But, we believe contentment comes from living a generous and purposeful life. One of our core beliefs is that everything we have is a gift from God. In addition, we have the moral responsibility of stewardship for those blessings.

We look at stewardship through three lenses: provision, contentment and enjoyment. In our work together, we will focus on provision in the context of financial security and retirement income planning. We will also help you develop and practice a purposeful relationship with money by incorporating contentment and enjoyment into your money habits. Our mission is to help you achieve fulfillment and confidence with money. We do that by getting to know you, partnering to understand your objectives, and delivering meaningful advice.

It's our privilege to serve on your journey to a more purposeful relationship with wealth.

Let's connect

thrivent.com/pdw

purposedrivenwealth@thrivent.com

Loveland office
4184 St. Cloud Dr., Ste. 204, Loveland, CO 80538
970-330-7411

Cheyenne office
401 W. 19th St., Ste. 304, Cheyenne, WY 82001
307-778-3076

Advisory services

There's no shortage of information about how to be successful with money. But if information was the solution, then everyone would be a retired millionaire by now. Our focus is encouraging clients to practice wisdom.

We provide value by delivering competent and comprehensive advice, time savings and preventing the opportunity cost from making mistakes. We help people navigate the winding road of financial choices and illuminate blind spots, so the decision-making path is clear and actionable.

Practice owners

Clint Jasperson

CFP®, RICP®, CKA®, FIC
Wealth Advisor
CA Insurance Lic. #0I37255

Clint kicked off his academic journey at the University of Wyoming in 2003, diving into psychology and business with the enthusiasm of a true trailblazer (go Cowboys!). Not one to rest on his laurels, he earned his master's in education from the University of Vermont in 2009, proving that curiosity—and perhaps an addiction to learning—never goes out of style. Today, as the managing partner and original founder of our organization, Clint blends sharp pencil math with a hearty dose of "heart math" wisdom (pun intended). Whether he's crafting financial strategies or nurturing client relationships, his leadership is as pragmatic as it is personable—think of him as the friendly architect behind our team's and clients' success.

Lotem Sella

Director of Investment Operations
CFA®

As the director of investment operations, Lotem manages the brokerage operations and research division, overseeing trade execution and investment research to develop strategic recommendations for clients. Lotem holds a BFA in film studies from CU Boulder and earned his Master of Science degree in finance with a focus on Risk Management from CU Denver. As a Chartered Financial Analyst (CFA), he's committed to maintaining the highest standards of professional excellence.

Lotem's passion lies in researching innovative asset allocation techniques and staying current with market trends to optimize client portfolios. He's developed sophisticated operational systems that efficiently manage large sums of money for many clients. Lotem takes pride in translating complex financial concepts into actionable strategies that help clients achieve their long-term financial goals while aligning with their values.

Our team

Alyssa Davis

Associate

Born and raised in Omaha, Nebraska, Alyssa's journey led her to Colorado State University, where she earned her undergraduate degree in business administration double concentrating in financial planning and accounting. Her thirst for knowledge didn't stop there—Alyssa went on to earn her Master of Accountancy degree with a specialization in taxation.

After completing her studies, Alyssa joined Purpose Driven Wealth, where she worked as a paraplanner and honed her skills in the financial world. After gaining invaluable experience, she transitioned into a financial advisory role, where she thrives today. Alyssa is deeply passionate about educating clients about their financial opportunities and walking with them through life's transitions—the exciting and the challenging ones. There's something special about helping people navigate both the peaks and valleys of their financial journey, and Alyssa takes pride in building lasting, meaningful relationships with clients as they evolve together.

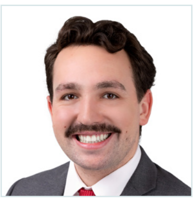
Alyssa's unique blend of expertise, genuine care for people, and ability to keep things light and fun has enhanced the way we serve our clients.

Daniel Sonnenberg

Associate

CA Insurance Lic. #4315603

Danny is a graduate of Colorado State University in Fort Collins, where he earned his degree in economics. With several years of experience as a financial advisor, he joined the Purpose Driven Wealth team, bringing a wealth of knowledge and a hands-on approach to client service. As a financial advisor, Danny is instrumental in helping clients navigate complex financial concepts with clarity. He's not one to shy away from a good spreadsheet to illustrate key points in meetings, and he thrives on explaining financial ideas in simple, understandable terms. Danny holds various securities registrations and multiple health and life insurance licenses, allowing him to provide experienced guidance across a broad spectrum of investment and planning topics. He's passionate about simplifying the often-overwhelming world of finance and helping his clients implement thoughtful, generosity-driven financial strategies.



Jesse Doke

Associate

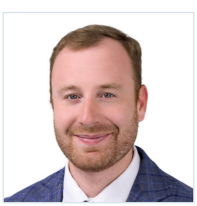
Jesse takes on the role of a paraplanner at Purpose Driven Wealth and has a passion for helping clients achieve their financial goals. He graduated from Colorado State University with a degree in finance in 2022. Jesse plays a vital role in supporting our financial advisors by assisting with financial planning, portfolio management and client strategy development. His expertise helps ensure that clients receive personalized, well-structured financial guidance to help secure their futures. Dedicated and detail-oriented, Jesse is committed to delivering high-quality support and helping clients navigate the complexities of financial planning with confidence.

Peyton Esposito

Client Service Coordinator

Peyton graduated from the Warner College of Natural Resources at Colorado State University in 2020, with a degree in natural resources of recreation and tourism and a minor in business administration. As the client service coordinator, she plays a key role in marketing, client engagement and event planning. She manages social media content, newsletters and events, continually finding new ways to strengthen client relationships and keep them informed, engaged and supported. Her deep commitment to volunteering and charitable giving aligns with her work in helping clients explore ways to incorporate generosity into their own financial plans, making a lasting impact in their communities.

Beyond client engagement, Peyton is dedicated to streamlining internal processes, enhancing efficiency and improving workflow systems to support the team effectively. Peyton holds a Colorado Life and Health license and continues to expand her expertise in the financial industry to better serve clients.



Joseph Dobson

Investment Analyst

Joseph is a investment analyst , specializing in brokerage operations and research. With a focus on portfolio management and trade execution, he assists financial advisors in providing quality solutions for their clients on the brokerage platform. Holding Series 7 and Series 66 licenses, Joseph has a strong foundation in securities analysis and is passionate about supporting clients to achieve their investment goals. His keen understanding of market trends and trading strategies enables him to deliver impactful insights and helps ensure seamless portfolio management. Joseph is dedicated to helping financial advisors navigate the complexities of the investment landscape with confidence and precision.

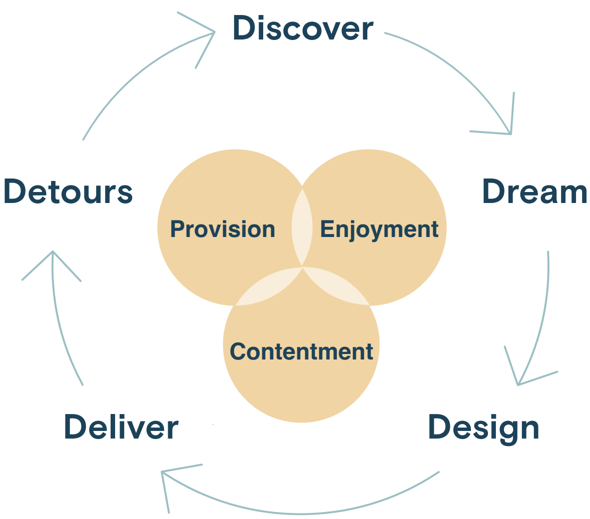
Lindsay Kimbrell

Operations Manager

Since joining the team in 2018, Lindsay has been a driving force behind the practice's operations. Working remotely from Texas, she brings a strategic and detail-oriented approach to managing staff and business operations, all while helping ensure an exceptional client experience. A proud graduate of Texas Tech University and a licensed life and health professional, Lindsay blends industry expertise with a passion for efficiency, keeping our practice running smoothly and our clients well-supported.

Our advisory process

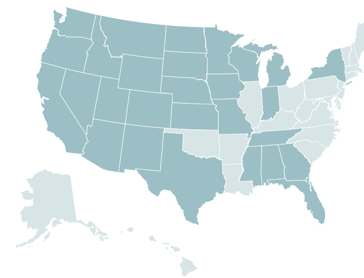
Each step of the Purpose Driven Wealth Advice Path takes you closer to discovering and achieving your goals and achievements; living a life of provision, contentment and enjoyment.



What you can expect

We exist to help you achieve financial clarity and navigate the numerous life transitions you'll experience throughout your life.

The advice our practice delivers is based on biblical principles and wisdom. We will ask the right questions, share relevant stories, and use simple language as we strive to understand you, first and foremost. We believe listening, teaching and coaching are critical as we guide you through your life journey.



Our team serves clients nationally and is licensed in:

AL	MI	OR
AZ	MN	SD
CA	MO	TN
CO	MS	TX
FL	MT	UT
GA	ND	WA
IA	NE	WI
ID	NM	WY
IN	NV	
KS	NY	

As of March 2025.

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