

News with a Purpose

First quarter

March 2024

Our team



At Purpose Driven Wealth, we act as responsible stewards for our clients by providing thoughtful advice and using our wealth management approach to help you achieve confidence, clarity and contentment. Our process includes understanding your current situation, discovering your goals, designing a plan, delivering solutions and sustaining progress.

thrivent.com/pdw

Windsor Office

355 Eastman Park Dr., Ste. 201
Windsor, CO 80550
970-330-7411
Office hours: 9 a.m. to 4 p.m.

Team member spotlight: Alyssa Davis, Service Advisor

Alyssa was born and raised in Omaha, Nebraska, and moved to Fort Collins, Colorado, to attend Colorado State University. She earned her undergraduate degree in financial planning and accounting, and her master's degree in accountancy, specializing in taxation. Alyssa joined the PDW team in 2020 and is excited to create long-lasting relationships. In her free time, she loves baking, immersing herself in crime novels and enjoying the Colorado sunshine. Alyssa has been promoted and is now a service advisor for our team. Here are some fun facts about her:

Favorite snack? I love chips and queso! If I am picking a restaurant, I typically lean towards any place where I can get chips, queso and a margarita.

Favorite place to visit in Colorado? I haven't been to many places in Colorado yet, there is so much more I want to explore. One of the places I have been to a few times and really enjoy is Steamboat Springs. I am not a skier and don't really like the cold, so I would prefer to be there in the summer so I can hike and explore the town.

Most recent travel spot? Last year I took a family trip to Destin, Florida. It was extremely beautiful and relaxing. The sand is like powdered sugar and the water



is the clearest emerald color. We really enjoyed laying at the beach, reading, barbecuing and exploring the boardwalk.

What do you like to do in your spare time? I like to go out and do different activities; that could be golfing, bowling, escape rooms, breweries, etc. I like to be active and experience something different.

How do you help clients? I help our clients in many ways. One of our main jobs as advisors is to provide clarity and assurance to our clients. I help supply clarity and confidence through the advice and planning we give. A few ways I do that are by making myself available for questions, providing timely responses/follow up and knowing our clients beyond just their financial goals. I believe our clients know they are being taken care of and they matter to us.

Meet the team



Clint Jasperson
Wealth Advisor



Alyssa Davis
Associate



Lotem Sella
Investment Analyst



Zach Slayton
Associate



Peyton Thomas
Insurance Support
Associate



Lindsay Kimbrell
Operations Manager

Thrivent Action Teams



We hear it all the time: Our clients love Thrivent Action Teams!

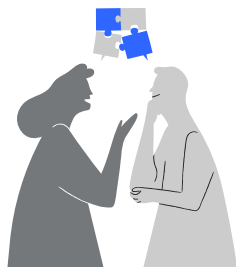
Follow these steps to get started:

- Identify a need in your community.
- Gather a team.
- Apply to lead a fundraiser, educational event or service activity.

Thrivent provides everything needed to get started, including up to \$250 in seed money. Do you have an idea?

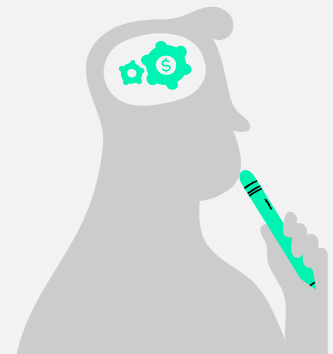
For more information and to apply: bit.ly/430FSS9.

Send your Action Team pictures to peyton.thomas@thrivent.com for a spotlight on our Facebook and Instagram pages.



Do you have friends or colleagues who you know would benefit from working with our team? We would love to connect with them!

Working tax efficiency into your financial strategy



According to a recent survey, the most valuable piece of advice that current retirees would have given their younger selves would be to learn about tax implications for their retirement savings.

[Read this article](#) to learn more about strategies you can put to work that could help reduce what you pay now and in retirement.

Fun recommendations from the team

Northern Colorado recommendations by Alyssa



City Park Food Truck Rally in Fort Collins, Colorado

City Park hosts food trucks every Tuesday night from May to September. This is a fun activity because there is a variety of food options and there is always a local band playing music. After a long day of work, it's nice to sit on the grass and eat great food!



Mighty River Brewery in Windsor, Colorado

Mighty River has a wide selection of beer, so there are options for all different beer lovers. They typically have a food truck parked out front or they are also located next to PizzaVino, so if you get hungry there are options. In summer, they have live music on the weekends. It's a nice place to listen to music, drink good beer and enjoy the Colorado sunshine.



Main Event in Windsor, Colorado

Main Event, formerly known as The Summit, offers a ton of fun in one location. You can bowl, play arcade games and dominate at laser tag.

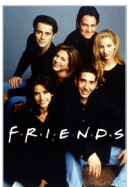


Union Bar & Soda Fountain in Fort Collins, Colorado

All I can say is this place is SOOO good! It's a fun place to have cocktails and appetizers with friends. They have a great patio in the summer. My go-to order is the Sunshine Daydream and Grilled Cheese Dippers—I mean come on, a boozy milkshake, say no more!

TV show recommendations by Lindsay

My favorite TV shows to watch are comedies. My husband makes fun of me because he knows if I can't find a new show to watch, I usually go back to one of these and watch the entire series over again. I have lost count of how many times I watched these from start to finish.



“Friends”

My favorite show of all time. I love that the characters all have different personalities that work well together, and the show has a nice flow to where it still includes all their stories in each episode.



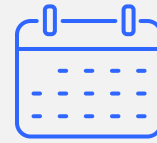
“The Office”

Growing up, I always hoped an office job would be like this show. Obviously, that would be very difficult to be successful in business if your boss acted like this all the time, which is why I love this show. I have seen it so many times and I still laugh at the same jokes. The delivery these actors use makes it so good.



“Parks and Recreation”

This show has a special place in my heart. I used to work in the parks and recreation department when I was in college and this show is very accurate to the type of scenarios and people I encountered during my time there.



Important dates

Saturday, March 2

Zach's birthday

Tuesday, March 12

Jeff Bush virtual event

Sunday, March 17

St. Patrick's Day

March 21–22

PDW business planning event

Our office hours will vary during these dates. We will not be available in-person, but please leave a voicemail or email us and we will get back to you as soon as we can.

Monday, March 25

Alyssa's birthday

Friday, March 29

Good Friday
(offices closed)

Sunday, March 31

Easter

Sunday, May 12

Mother's Day

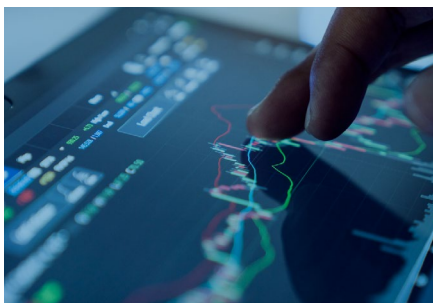
Monday, May 27

Memorial Day
(offices closed)

PDW's Santa Paws event results

In December, we held a charitable event for NOCO Humane where we made tie blankets and toys for the animals in the shelter. We made 195 blankets and toys, and donated a total of 390 toys, blankets and treats to NOCO Humane.

Thank you to our clients who came out to help us make an impact on the shelter animals. And thanks to PetSmart, Tractor Supply and Kong for having fun toys for us to donate!



Client market update

Last month, we held our Economic Review and Market Outlook – Quarterly Considerations webinar for clients. We provided guidance to keep everyone up-to-date on what's going on with the markets and economy, and how it relates to everyone's personal situation. We hold these quarterly throughout the year and would love to see more people attend! Check out our Facebook and Instagram for our next Economic Review and Market Outlook – Quarterly Considerations webinar. We will also send out an email invite.

Stay connected

Check our team website, Instagram and Facebook pages for the latest news and upcoming events.

Website: thrivent.com/pdw

Instagram: [instagram.com/purposedrivenwealth.thrivent](https://www.instagram.com/purposedrivenwealth.thrivent)

Facebook: [facebook.com/Purpose.Driven.Wealth.Thrivent](https://www.facebook.com/Purpose.Driven.Wealth.Thrivent)

Email: purposedrivenwealth@thrivent.com

Clint's LinkedIn: [linkedin.com/in/clintjasperson](https://www.linkedin.com/in/clintjasperson)

Thrivent provides advice and guidance through its Financial Planning Framework that generally includes a review and analysis of a client's financial situation. A client may choose to further their planning engagement with Thrivent through its Dedicated Planning Services (an investment advisory service) that results in written recommendations for a fee.

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. [Thrivent.com/disclosures](https://thrivent.com/disclosures).

Member benefits and programs are not guaranteed contractual benefits. The interpretation of the provisions of these benefits and programs is at the sole discretion of Thrivent. Membership benefits are reviewed and evaluated regularly. Thrivent reserves the right to change, modify, discontinue, or refuse to provide any of the membership benefits or any part of them, at any time.

You should never purchase or keep insurance or annuity products to be eligible for nonguaranteed membership benefits. You should only purchase and keep insurance and annuity products that best meet the financial security needs of you and your family. Consider the cost, features, and benefits of specific insurance and/or annuity products.

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](https://thrivent.com) or FINRA's BrokerCheck for more information about our financial advisors.

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