Purpose Driven Wealth

Newsletter

Second quarter June 2025

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

Loveland office
4184 Saint Cloud Dr., Ste. 204
Loveland, CO 80538
970-330-7411
Office hours: 9 a.m. to 4 p.m.
Friday hours: Office will close at 2 p.m

Cheyenne office
401 W. 19th St., Ste 304
Cheyenne, WY 82001
307-778-3076
Office hours:
By appointment only
Friday hours: Office will close at 2 p.m

Scan to visit our website

Team member spotlight: 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.

Lindsay and her husband, Chuck, met while attending Texas Tech and have built a beautiful life together with their three daughters, Harper, Harley and Hadley. Lindsay cherishes family time—whether it's experimenting with new recipes in the kitchen, enjoying family movie night or making memories with extended family.

Q&A

What's your go-to weekend activity? Going to grab food with the family either Friday or Saturday night, then watching a movie that recently came out. During summer months, we try to go swimming at my dad's house every weekend.

What's your favorite way to unwind after a long day? Once it is time to relax for the day, I like to get in my comfy clothes and eat some sort of sweet treat while catching up on TV shows I missed.

If you could have dinner with any historical or famous figure, who would it be and why? I would love to have dinner with Princess Diana. I've always been fascinated by the British monarchy, partly because my grandmother was born and raised in England. Growing up, she would share stories of her life there, and Princess Diana was someone she spoke of with such admiration. Over time, I developed my own appreciation for Diana—not just as a public figure, but as someone who truly seemed to lead with compassion and grace. Even after stepping away from the royal family, she used her platform to bring awareness to important causes and connect with people on a deeply human level.

What's your dream vacation destination? My husband and I have always dreamed of visiting the Maldives. There's something so magical about staying in one of those private overwater villas, where you can step right off your deck into the crystal-clear, turquoise-blue ocean. We imagine waking up to the sound of gentle waves, sipping coffee while watching the sunrise over the water, and spending the day snorkeling, relaxing in a hammock or just soaking in the serenity.

Meet the team

Clint Jasperson. CFP®, FIC, RICP®, CKA®, CEPA®
Wealth Advisor

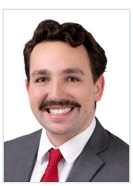
Loveland, CO and Cheyenne, WY

Alyssa Davis
Associate

Loveland, CO and Cheyenne, WY

Daniel (Danny) Sonnenberg
Associate

Loveland, CO and Cheyenne, WY



Jesse Doke
Associate

Loveland, CO and Cheyenne, WY

Peyton Esposito
Client Service Coordinator

Loveland, CO

Lotem Sella, CFA
Director of Investment Operations

Loveland, CO

Joseph (Joe) Dobson
Investment Analyst

Loveland, CO

Lindsay Kimbrell
Operations Manager

Loveland, CO

Next steps post tax season

To help our team provide you with the personalized planning experience you need, please share a copy of your completed 2024 federal and state tax return with us. Reviewing your tax returns provides an opportunity for us to identify potential financial planning strategies that can help minimize your tax liability.

Our team will use this information to do a complete "tax efficiency checkup" for you, which will include:

- Reviewing taxable assets
- Assessing implications of tax law changes.
- Confirming your tax bracket information to determine the most appropriate federal and state withholdings on taxable withdrawals.
- Developing tax strategies such as Roth conversions, charitable giving and legacy/estate planning, for our Dedicated Planning Services clients.

To submit, simply do one of the following:

- Use the secure **link** to upload directly to us
- Drop a copy at our office
- Fax a copy to our office at 970-330-7424

Quarter 1 Business Planning

We kicked off the year strong with our Quarter 1 Business Planning session. From diving into the evolving world of AI to revisiting our Team Core Values, we took time to reflect, learn and gear up for Quarter 2. A big thank you to our business coach, Drew, for guiding us through strategic goal setting.

Outside the office, we gave back by volunteering at Serve 6.8, helping organize food and clothing at their warehouse—a great reminder of the impact we can make in our community. We wrapped up the day with some friendly competition at Top Golf.

Refer a friend and inspire a purposeful financial future

At Purpose Driven Wealth, we believe contentment and fulfillment stem from living a generous and purposeful life. By referring someone you care about to our team, you can help them discover financial clarity and confidence while contributing to something meaningful.

How it works:

- Share the opportunity: Provide our contact information to a friend, family member or colleague who could benefit from financial guidance rooted in stewardship and purpose.
- Connect us: Allowing us to serve those you know, love and care about is the best possible compliment! We look forward to speaking with them.
- We'll guide them: We'll offer a complimentary consultation to help them explore their financial goals with tailored advice.

Why Purpose Driven Wealth?

- A focus on stewardship through provision, contentment and enjoyment.
- Personalized, biblically inspired advice for financial security and retirement planning.
- Guidance rooted in wisdom to illuminate financial choices and simplify decision-making.
- A team dedicated to helping you navigate life's transitions with clarity and confidence.

Take the next step toward a generous future.

Share our contact details with your referrals. Have questions? Call 970-330-7411 or email **purposedrivenwealth@thrivent.com**.

Front Range Area – Spring Impact Meeting

We're so proud of Clint and Lotem for sharing their valuable insights at the Front Range Area – Spring Impact Meeting in Black Hawk, Colorado!

Their thoughtful strategies and real-world experience on growing practices and deepening client relationships made for an impactful discussion. We're also incredibly appreciative of Thrivent Financial Advisor Zac Kibby, who continues to speak positively about our work and collaborate with us in such meaningful ways.

It's always a pleasure to work alongside such dedicated financial advisors who help elevate our work and contribute to events that bring advisors together.

Bring your passion to life with a Thrivent Action Team

As a benefit of membership, eligible Thrivent clients can lead an Action Team and receive a $250 Community Impact Card to kickstart their efforts. Whether you're organizing a food drive, hosting a fundraiser, or supporting a local nonprofit, this is a simple and impactful way to give back to your community.

Each approved Action Team also comes with T-shirts and promotional materials to help you spread the word and rally support. You can lead up to two Action Teams per calendar year, so there's still time to plan something meaningful in 2025!

Need inspiration or ideas? We're happy to help brainstorm or walk you through the application process.

Get started or learn more **here**.

Let's make a difference—together!

Our hidden gems and go-to tunes

Local hidden gems (Danny)

Newly completed walking/biking paved path along the Poudre River Trail between the CSU environmental learning center (Fort Collins) and Timnath.

I already enjoy Fort Collins paths, but this is a nice new path along the river with a scenic view of the mountains.

Parts and Labor Brewing Company, a restaurant and brewery in Sterling, Colorado

This small-town brewery punches above its weight for its top-quality food and beer. Check it out if you are ever on the way through.

Morning Fresh Dairy Farm in Bellvue, Colorado

Stop in at this dairy where you can get a tour of the facility or enjoy some great coffee or ice cream in the onsite café.

What we're listening to (Joe)

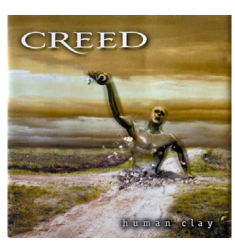
Favorite artist: Morgan Wallen

Morgan Wallen is hands-down my favorite artist because of the authenticity and emotion he brings to every song. His unique blend of traditional country roots with modern influences creates a sound that's both fresh and familiar. Whether it's a feel-good anthem or something more reflective, his music always resonates with real life in a way that few artists can capture.

Favorite song (not Morgan Wallen): 'Just a Dream' – Nelly

"Just a Dream" has stuck with me over the years for its emotional depth and storytelling. Nelly's blend of hip-hop and melody in this track captures the feeling of loss and longing in a way that's both catchy and deeply relatable. It's one of those songs that instantly takes you back to a moment in time and still holds up no matter how many times you hear it.

Song that gets me through work: 'Higher' – Creed



When the workday starts to drag, or the to-do list feels endless, "Higher" by Creed gives me the mental boost I need. There's something about the powerful vocals and uplifting lyrics that cuts through the noise and re-centers my focus. It's energizing without being distracting—basically my go-to anthem for pushing through tough deadlines or long afternoons. Plus, opening a white Monster energy drink to this tune is the ultimate motivation hack.

Important dates

June 12
Quarter 2
Business Planning.
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.

June 13, 4–6 p.m.
PDW's Lifetime Gift Event with Shelly Halverson
(No products will be sold.)

June 14
Flag Day

June 15
Father's Day

June 19
Juneteenth (offices closed)

July 4
Independence Day
(offices closed)

July 5
Joe's birthday

August 11
Finally Home Golf Tournament

September 1
Labor Day (offices closed)

September 13
Danny's birthday

September 24–28
World Long Drive Championships

Summer hours are here!

To help our team enjoy a little more sunshine and recharge during the warmer months, we'll be observing summer hours every Friday from May 30 through September 5.

Friday hours: Office will close at 2 p.m.
(Monday through Thursday hours remain the same.)

Wishing you a safe, sunny and joy-filled summer!

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**
Facebook: **facebook.com/Purpose.Driven.Wealth.Thrivent**
Email: **purposedrivenwealth@thrivent.com**
Clint's LinkedIn: **linkedin.com/in/clintjasperson**