

News with a Purpose

Third quarter

September 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

Loveland office

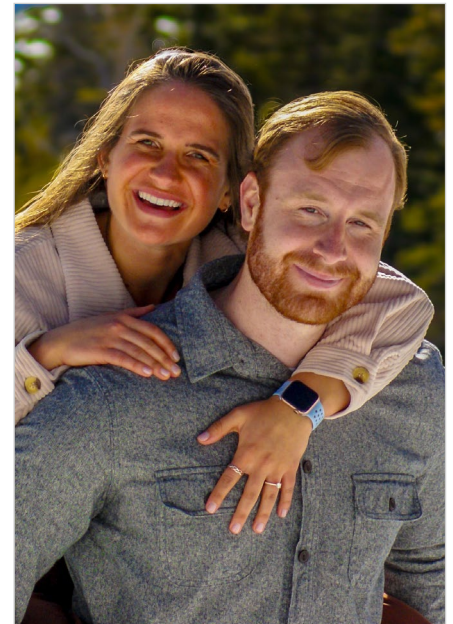
4184 St. Cloud Dr., Ste. 204
Loveland, Colorado 80538
970-330-7411
Office hours: 9 a.m. to 4 p.m.

Cheyenne office

401 W. 19th St., Ste. 304
Cheyenne, WY 82001
307-778-3076
Office hours: By appointment only

Team member spotlight: Joseph Dobson, Investment Analyst

Joseph was born and raised in Cheyenne, Wyoming, before heading to Colorado to attend the University of Northern Colorado in Greeley. He helps with brokerage operations and investment research at Purpose Driven Wealth. Joseph previously was heavily involved in bodybuilding and powerlifting but now enjoys trying out and enjoying all things fitness, including a little running. Additionally, he loves getting outside, spending time with family and friends, country music concerts, and is an avid Colorado Rapids soccer fan.



Favorite outdoor activity? Hiking.

Favorite snack? Doritos.

Favorite place to eat in Colorado? The Whiskey Still or the Mayor (both in Fort Collins).

Favorite travel spot? My favorite place I've ever visited was Northern Italy. Particularly the Cinque Terre.

If you had to eat one meal every day for the rest of your life, what would it be? Tacos.

New office coming soon

We have purchased a new office space—stay tuned for updates on when we move and other exciting news to follow!



Meet the team



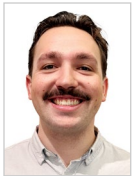
Clint Jasperson
Wealth Advisor



Alyssa Davis
Associate



Daniel (Danny) Sonnenberg
Associate



Jesse Doke
Associate



Peyton Thomas
Insurance Support
Associate



Lotem Sella
Director of
Investment
Operations



Joseph (Joe) Dobson
Investment Analyst



Lindsay Kimbrell
Operations Manager

Action Teams: What makes a Thrivent Action Team possible?

The idea starts with you

Giving from your heart is your passion. When you see a need in your community, you jump in to help. You've inspired family and friends to join you. Now, all you need is a little kick start to put it into action.



We work with you to make it happen

Thrivent is a membership-owned fraternal organization, as well as a holistic financial services organization. That means we serve our clients—not shareholders on Wall Street. With Thrivent membership, you become a part of something bigger and have access to generosity programs that help amplify your impact in your community.

Your idea is one of many

Now imagine all the people out there with ideas for improving the communities in which they live and work—like the more than 2 million clients we serve. Thrivent Action Teams can help bring these ideas to life and help our clients make the most of all they've been given.

Quarter 2 business planning



Purpose Driven Wealth's Quarter 2 Business Planning

Last month, we completed our second quarter business planning session. We recently expanded our team, so we focused our time together reviewing team goals and planning what we want our next six months to look like. We also enjoyed spending time getting to know each other outside of a work setting.

Restaurant and TV recommendations

Places to visit in Cheyenne or NOCO (Jesse)



PizzaVino in Windsor, Colorado

PizzaVino is a local restaurant that brings the taste of Italy to Northern Colorado. Whether you are craving pizza, pasta or one of their many delicious appetizers, they have something for everyone including delicious wines and beers to compliment your meal.



830 North Chipper's Lanes in Fort Collins, Colorado

830 North is my go-to bowling alley, not only because the atmosphere is wonderful for a night out with friends, but they have also introduced a new event called "Live on the Lanes." They work with local artists and put on a concert with the stage situated on the lanes. Nothing beats bowling while listening to live music.



Breckenridge Brewery in Fort Collins, Colorado

Breckenridge Brewery is a new brewery to Fort Collins located near Odell and New Belgium. It is a great place to hang out with friends and try a wide range of beers. They have live music, bingo, trivia and wonderful burgers.

TV show recommendations (Danny)



"Survivor"

"Survivor" is a timeless American reality TV show that helped kick off the reality TV show scene.



"Mad Men"

This classic TV show explores the glamorous and dark side of the lives of advertising executives at a fictional advertising agency set in 1960s New York. It is entertaining but also brings in history as it tells the story of social change in the 1960s.



"Man in the High Castle"

Based off a novel, this fictional show explores the hypothetical version of history in which Nazi Germany and Imperial Japan won World War 2 instead of the allies as they were the first to develop the Atomic Bomb. It also blends in elements of science fiction.

Thrivent and Serve 6.8 team up to tackle the Northern Colorado fires

Serve 6.8 and the Thrivent Member Network raised \$48,440 to those impacted by the Northern Colorado fires. Serve 6.8 is one of the main conduit organizations working to get funding and resources to relief agencies in the Northern Colorado area. For every \$2 donated, Thrivent boosted it by \$1. And, Thrivent pays the processing fees for the donations, so 100% went to help those in need.



Important dates

September 19–20

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.

September 23–27

Office closed. PDW moving to our new office.

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.

October 9

Lindsay's birthday

October 14

Columbus Day

October 15

Clint's birthday

October 31

Halloween

November 5

Election Day

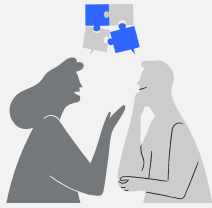
November 11

Veterans Day

November 18–20

Office closed. PDW will be attending a conference.

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.



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

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)

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

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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.

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.