Rainier Regional Group

thrivent

Quarterly Newsletter

First quarter January 2024

Our team

253-271-3290

Washington
Bellevue, Gig Harbor, Kirkland and Federal Way

Arizona
Phoenix

South Carolina
North Charleston

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A word from the team

The latter half of 2023 served as a significant period of reflection for our team. This time provided us with the opportunity to contemplate the direction of our practice and to meditate on how we can best serve both God and our clients as we continue forward.

As our team continues to grow and develop, our commitment to being led by faith, guided by compassion and dedicated to excellence remains the foundation of all the work we do. We look forward to sharing these new developments with you in the upcoming months and eagerly await your thoughts and insights. Your feedback has been essential in helping us refine and enhance our services to meet the needs of our community more effectively.

In faith and service,
Your dedicated financial team

Welcoming Jeff Hall

We are pleased to announce a new partnership with Jeff Hall, a respected advisor with more than 30 years of dedicated service at Thrivent. Having collaborated with Jeff in the past, we've been consistently impressed by his family-oriented and service-driven approach.

Through this partnership, we hope to blend Jeff's extensive individual expertise with our team's collaborative strength, with the goal of elevating our offerings and expanding our community connections.

You asked, we listened: Expanding our calendar availability

In our commitment to providing you with timely and effective service, we're adding more time from our advisor team to our scheduling application. This means that you'll have increased access to our experienced team, helping ensure your questions are answered promptly and your needs are met more efficiently.

Stay tuned for more updates as we work towards enhancing your experience with us. Your satisfaction is our top priority, and we're excited to offer more opportunities to engage with our dedicated team of advisors.

Meet our new team members

Catherine Krauter
Office Professional

Caty began her career in the financial industry during her senior year at college, finding the work to be a natural fit for her interests and personality. After serving for seven years as a financial advisor, she took a break to raise her three children.

Now with her children independent, Catherine is eager to return full time to help others maximize their financial opportunities, driven by a desire to give back and steward God's gifts.

Suzy Scott
Executive Assistant

Suzy, with more than 40 years of experience in logistics, is an exciting new addition to our operations team. Her career began in a Seattle biotech startup where she progressed in her role to become a community relations manager.

Suzy joined our team in 2023, applying her skillset to task and calendar management. Outside of work, she enjoys scrapbooking, being a devoted cat mom, and contributing to her community as a member of the local emergency preparedness team.

Riddle us this

"I am the shortest in the line, a leap adds one to make me fine. Lovers' whispers and groundhogs' peeks, in my span, romance and springtime seeks. What am I?"

Email us at jaynee.hartland@thrivent.com with your answer. We'll give a shoutout in the next newsletter to whoever gets it first.

Important Dates

Friday, February 9
Tax Reduction Strategies for Retirement workshop

Saturday, February 17
Team Volunteer Day with Feed My Starving Children

Friday, March 31
2023 Thrivent Choice Dollars® expire

Keep an eye out for an exciting update from our team coming this spring!

Create a charitable giving plan with tax-smart benefits

Charitable giving can help you gain a greater sense of gratitude for what you've earned. Giving generously to your family, community and society can also be a key part of a tax-efficient financial strategy.

Giving back provides personal satisfaction, helps make the world a better place, shows your gratitude, and shares your values. Read this article to learn more about purposeful giving, and then let's talk about how you can integrate giving with your financial goals.

Meet the team

Austen Wilson
MBA, BFA™
Financial Advisor
Bellevue, WA

Andrew Schroeder
Support Advisor
Charlotte, NC

Brian Lee
Service Advisor
Clarksville, TN

Catherine Krauter
Office Professional
Kenosha, WI

Phil Wuerffel
Market Director
Tacoma, WA

Nicholas Dare
MBA, CFP®, BFA™
Financial Advisor
Federal Way, WA

Monty Harmon
Associate
Olympia, WA

Ellis Holderbecker
Director of Client Experience
Charleston, SC

Melissa Fellers
Relationship Manager
Indian Land, SC

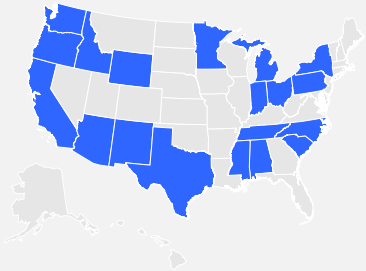
Jaynee Hartland
Marketing Coordinator
Olympia, WA

Alex Reeder
Director of Operations
Seattle, WA

Kim Nash-Walker
Director of Investment Operations
Salem, WI

Tanner Holderbecker
Administrative Assistant
Plymouth, MN

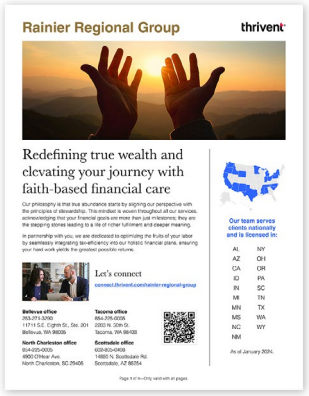
Suzy Scott
Executive Assistant
Seattle, WA



Our team serves clients nationally and is licensed in:

AL	MS	SC
AZ	NC	TN
CA	NM	TX
ID	NY	WA
IN	OH	WY
MI	OR	
MN	PA	

As of January 2024.



[Click here to check out our new team brochure.]

Tax OP-portunities from our operations team

Have a question about your Thrivent Tax Forms?

Visit thrivent.com/tax-resource-center for:

- Estimated tax form mailing dates.
- Reasons for receiving a tax form.
- IRS forms and instruction links.
- IRS retirement plan limits.
- Dividend and capital gains and cost basis reporting.

2023 Traditional IRA, Roth IRA, and CESA contributions: Make your final contributions for 2023 by April 15, 2024.

Contributions made to your Traditional IRA, Roth IRA, or CESA on or before April 15, 2024, can be reported under your 2023 tax filing if you indicate it is a 2023 contribution. Otherwise, it will be reported as a 2024 contribution. Maximum 2023 contribution for Traditional and Roth IRAs (total between both IRA types): $6,500 (plus a $1,000 “catch up” contribution if you are 50 or older).

2024 Retirement contribution limit updates: Contribution limits have increased to $7,000 (plus a $1,000 “catch up” contribution if you are 50 or older).

Tax filing deadlines: The tax deadline for filing individual 2023 IRS Federal Tax Returns is April 15, 2024. State filing deadlines may vary. October 15 is the final due date for your 2023 Tax Return if you filed for an extension.

Stay connected

Website: connect.thrivent.com/rainier-regional-group

Email: rainierregionalgroup@thrivent.com

Facebook: facebook.com/rainierregionalgroup

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