

Team Newsletter

April 2024



Left to right: Rick, Sue, Luke, Stephanie, James and Jesse.

Let's connect

Linking your faith, values and finances: we help you do well, so you can do good. At the Shields Cattau Financial Group, it is our priority to understand where you and your family want to be in five, 10, 15 years and beyond. Through active listening and our own insight, we create a turn-by-turn map to help guide you to your desired destination. This map can help you move closer to achieving your goals with the confidence to know you're on your way.

thrivent.com/shieldscattau

949-260-0442
959 South Coast Dr., Ste. 374
Costa Mesa, CA 92626

Team member spotlight

James Pendleton Insurance Support Associate

Many of you have noticed your reports are coming from a gentleman named James, so we wanted to share with you a bit more about him.

James started working with our team in the summer of 2022, following his graduation from the University of Minnesota Morris with a bachelor's degree in financial and organizational management. He works remotely from Redwood Falls, Minnesota, where he is enrolled as a member of the Lower Sioux Indian Community.

In addition to providing office support for our team, James is currently studying to become securities licensed (Series 7 and 66) in Minnesota. Some of his hobbies include spending time with family and friends, golfing, fishing and basically anything involving sports or being outside. Having played both basketball and golf in college, this isn't a surprise. James is a Minnesota Vikings fan, so this adds some lively discussion to our team meetings as no one roots for the same team.

If you have the chance, ask James about his recent hunting expedition with his dad—he is pretty ecstatic about it!

Rick Minton Practice Support Associate

With the growth of the Shields Cattau practice, Luke and Stephanie knew they needed to add more teammates to meet their high standard of customer service. Rick is the perfect fit. He is fully licensed, has advanced designations and has the experience of running his own Thrivent financial services practice. His main role on our team is to support Jesse Davison, Luke and Stephanie in providing excellent service to our existing clients in fulfilling their goals.

Currently based in Evansville, Indiana, Rick and his wife of 22 years, Nicole, have five children and two grandchildren. They enjoy attending events their kids participate in, especially band competitions and football games. They are rabid fans of the Denver Broncos, St. Louis Cardinals, Indiana Hoosiers and Notre Dame Fighting Irish.



LOVE IRVINE Serve event on November 4, 2023

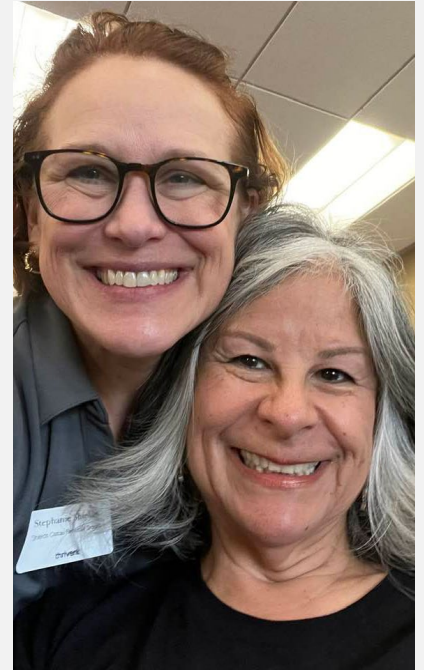
Our team loves to find ways to serve our community here in Orange County, California. The second event we did in 2023 was an all-city serve event called “Love Irvine.” The project we sponsored this year was making 100 no-sew fleece tie blankets for the 2/11 Marine Adoption Committee for Camp Pendleton. The completed blankets were given as gifts at their Christmas party, and according to the 2/11 group, the blankets were a top pick for many of the Marines as their gift.



Luke



Selena



Steph and Rita



Jaz and James



K and Hutch

Upcoming events

Love Costa Mesa Serve Event

Saturday, May 18: 9 a.m. to noon

Join us as we help work in the Shalimar neighborhood in Costa Mesa. We will be building raised garden beds and filling them with soil and vegetable plants, among other projects, as we partner again this year with local residents to help keep their neighborhood beautiful!

Mother’s Day Diaper Drive for 2/11 Battalion Baby Shower

May 12 – June 6

We’re stepping up to honor the unsung heroes, the devoted wives of our brave U.S. Marines. They sacrifice endlessly and we invite you to join us in showing our support by participating in a diaper drive we’re hosting. Your donations will be contributed to the annual baby shower for the 2/11 Battalion of Marines and their families stationed at Camp Pendleton.

Deadline for contributions is Thursday, June 6.

No products will be sold.

Love Orange Serve Event

Saturday, October 12: 9 a.m. to noon

These no-sew fleece tie blankets for the 2/11 Marine Adoption Committee for single marines stationed at Camp Pendleton are such a coveted item that we’re making more. Join us—no sewing involved!

Economic Update

Thursday, October 17: 11 a.m. to 1 p.m.

Attend to learn Thrivent’s perspective on the markets and economy. If you’re concerned about market fluctuations, interest rates and economic uncertainty, don’t miss this opportunity to help you invest with greater confidence. Stephanie and Luke will be joined by John Hershock, Regional Investment Consultant, to share helpful information and insight into the current market trends.

Love Irvine Serve Event

Saturday, November 2: 9 a.m. to noon

Our second yearly event doing the no-sew fleece tie blankets partnering with 2/11 Marine Adoption committee!

Smart charitable giving from your IRA

After focusing on saving for decades, shifting your mindset to withdrawing those savings could take some effort. If you saved in certain retirement accounts, such as traditional IRAs or 401(k)s, once you reach a certain age you must begin taking required minimum distributions (RMDs) annually from those accounts—whether you need the money or not.

If you don’t need the money and are charitably minded, a qualified charitable distribution (QCD) offers potential tax benefits. Individuals age 70½ or older can give up to \$100,000 from a traditional or inherited traditional IRA tax-free. This distribution will count toward your RMD for the year as long as it’s made payable to a qualified charity by the year’s end. [Read this article](#) to learn more, and let’s talk about how you can use your retirement savings to support a cause you care about.



Thrivent Choice®: Together we are making a difference

Thrivent Choice is a charitable grant program that gives eligible Thrivent clients with membership the opportunity to influence where Thrivent distributes some of its charitable funds each year. Clients are invited to direct Choice Dollars® among thousands of enrolled nonprofit organizations, including churches, camps, schools, seminaries, campus ministries and more. Our clients have directed over \$698,000 in Choice Dollars since January 1, 2010, to the charities they love.

Congratulations Luke and Stephanie on being a 2023 Voices in Philanthropy recipient and being the #1 team in the Thrivent career channel

Through planning, Luke and Stephanie have helped their clients create over \$32.7 million in gifts to charities they love. This is just one of the many ways Luke and Stephanie fulfill their mission of helping their clients connect their faith, values and money. [Read this article](#) for more information on creating a generosity plan for your family.

Stay connected

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Facebook: facebook.com/shieldscattaufinancialgroup

Email: shieldscattaufinancialgroup@thrivent.com

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The Thrivent Choice® charitable grant program engages Thrivent clients with Membership and Thrivent Member Networks in providing grants that support charitable activities, furthering Thrivent's mission and its purposes under state law. All grant decisions, including grant recipients and amounts, are made at the sole discretion of Thrivent. Directing Choice Dollars® is subject to the program's terms and conditions available at thrivent.com/thriventchoice.

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.

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