

# Team Newsletter

November 2024


**Left to right:**
**Jesse Davison**, Director of Dedicated Planning and Investment Operations

**Luke Cattau**, Associate Wealth Advisor

**Richard Minton**, Service Advisor

**James Pendleton**, Client Service Administrator

**Stephanie Shields**, Wealth Advisor

**Fred Chambers**, Financial Advisor

## Let's connect

Our mission is to help our clients do well—as they define it—so they can do good. We believe we are called to leave the world a better place, and we are passionate about helping those we serve do the same.

**At Shields Cattau Financial Group, we are compelled to make an impact.**

By leading with our own hearts, we can help you better follow yours. We begin by understanding and honoring what you value. Then we create a holistic plan and provide thoughtful advice that is tailored to you. Along the way, we have meaningful conversations and form genuine relationships because it's who we are and what drives us.

It gives us great joy to see our clients achieve milestones they once felt were out of reach.

[thrivent.com/shieldscattau](https://thrivent.com/shieldscattau)

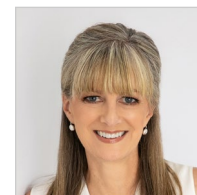
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Costa Mesa, CA 92626

## Farewell to Office Manager, Sue Shelton

Having just completed my 14th year working with Stephanie Shields/Shields Cattau Financial Group, it is bittersweet to announce that I am retiring at the end of this year.

I have enjoyed getting to know you, our fabulous clients—we seriously have the best. In addition to serving our clients with their various needs, I have fond memories of putting on a myriad of events over the years. Our “Purchase with a Purpose” shopping and social events (ask Stephanie about the unique greeting cards), the women's teas, and the Love Costa Mesa & Love Irvine events are some of my favorites. Planning and participating with our clients in these charity events is a highlight of my time here.

My husband, Glenn, and I have been married 41 years and have a daughter, son-in-law and two granddaughters who live locally, and a son who lives in Dallas. In my free time, I enjoy reading, creative writing and traveling. My latest joy has been supporting my budding ballerina and flag-footballer. I look forward to spending more time doing all of the above!



## Team member spotlight: Meet Financial Advisor Fred Chambers

I came to Thrivent six years ago after 22 years as a pastor and missionary. We served in the U.S. as well as in Indonesia and Bangladesh.

One of the universal needs we've seen is for families to develop personal finance knowledge and habits so that they can live with financial confidence and freedom. I joined Shields Cattau Financial Group as a financial advisor in 2024 because of our shared passion for serving Christian families, churches and our local cities.

My wife, Lisa, and I have been married since 1996 and have six adult children living locally. Lisa is a registered nurse. We are very involved in our local church and with nonprofits in Orange County. We enjoy sailing out of Dana Point Harbor and visiting national parks.



## Team member spotlight: Meet Insurance Support Associate Jared Ammons

I am attending Texas State and will graduate this fall with a degree in business management. I reached out to Stephanie, who my parents have known since before I was born, for an informational interview, and I told her my goal is to be a financial advisor. At the end of the call, she offered me a summer/fall internship. I recently obtained my life, health and annuity license.

I live in Austin and have a white pit bull/dalmatian mix who entertains me and keeps me busy. In my free time, I enjoy basketball, outdoor activities and good food with friends and family.

## Making an impact—together

Whether you want to leave a legacy for the family you love, support your church or local community, or give back to nonprofits you care about, let us take the complexity out of the planning. We can help you spread the joy of generosity and fill the world with hope, your way.

We're proud to support and partner with nonprofits and abundance-minded clients. Whatever's in your heart, we can help you make the most of your generosity. Because at the end of the day, it's more than your money, it's your legacy. Together we can do incredible things!

### Diaper Drive

We hosted a Mother's Day Diaper Drive for a 2/11 Battalion Baby Shower for Marines and their families stationed at Camp Pendleton.

### Love Costa Mesa Serve

We hosted a Love Costa Mesa Serve Event. We worked together planting and beautifying the Shalimar Neighborhood.

### Habitat in Poland

Stephanie and her husband, Bob, recently joined a Thrivent Habitat for Humanity Build in Poland. If you need help with drywalling, Stephanie said she is still not your person!

### Love Orange and Love Irvine event recap

At our recent Love Orange and Love Irvine events, we crafted no-sew fleece tie blankets for the 2/11 Marine Adoption Committee. These blankets are highly cherished by single Marines stationed at Camp Pendleton. We were pleased to have such a great turnout of volunteers! We had 60 volunteers make 80 blankets at Love Orange and 120 volunteers completed 120 blankets at Love Irvine, making a total of 200 blankets that will go to the marines at Camp Pendleton!

### Hurricane Helene impact and Thrivent's response

The impact of Hurricane Helene stretches from Florida's Gulf Coast to the Appalachian Mountains in Virginia, and recovery is expected to take months (or longer) for some communities. Thrivent has quickly activated our generosity programs to drive impact and support those in need.



Diaper Drive donations.



Love Costa Mesa Serve event volunteers.



Love Costa Mesa Serve event volunteers.



Love Costa Mesa Serve event volunteers.



Stephanie and Bob at Habitat in Poland.



Fred and Luke at Love Orange.



Love Irvine volunteers.



Love Orange volunteers.



Our team at Love Irvine.

## Upcoming events for 2025

### 2025 ID theft presentations

**Thursday, January 30 and Thursday, February 27  
11 a.m. and 7 p.m. (office or Zoom)**

Join us for a cybercrime and identity protection presentation with former FBI Agent, Jeff Lanza. In this non-technical presentation, Jeff discusses the latest hacks, security breaches and computer scams to demonstrate how cybercrime occurs and what countermeasures individuals can take to be more cyber secure. Refreshments will be provided.

Speaker is not affiliated with Thrivent. Views are his own.

### Economic Update

**Thursday, March 20 at 8 a.m., 10 a.m. and Noon**

Learn Thrivent's perspective on the markets and economy through live presentation and Q&A. A meal will be provided.

### Love Costa Mesa Day

**Saturday, May 17, 9 a.m.–Noon**

Join us as we continue to help beautify the Shalimar Neighborhood.

No products will be sold at these events.

### Your member benefits

#### Thrivent Action Teams

You can raise funds or lead a service activity by forming a Thrivent Action Team. After the project is approved, we'll expedite the shipping of the Thrivent Action Kit to the leader so they can quickly get started.

- Visit the [Thrivent Action Team page](#) to get started.
- When applying, enter code "Hurricane Helene2024."
- A Thrivent Action Kit containing team T-shirts, a community impact card with up to \$250 in seed money to launch the efforts and promotional materials will be expedited shortly after the project is approved.

#### Thrivent Choice®

Eligible clients with membership can also direct Thrivent Choice Dollars® to organizations helping with disaster recovery efforts.

## Stay connected

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Facebook: [facebook.com/shieldscattaufinancialgroup](https://facebook.com/shieldscattaufinancialgroup)

Email: [shieldscattaufinancialgroup@thrivent.com](mailto:shieldscattaufinancialgroup@thrivent.com)

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