

# Northbound News



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## In this issue

- Team member spotlight
- Congratulations, Alex
- Bringing generosity to life by dancing
- Mission XX–U.P. Honor Flight 2023
- Thrivent Choice®
- Thrivent Action Teams
- Upcoming events



## Your goals, our strategy

Northbound Group is excited connect with you and share updates through the launch of our team newsletter. We look forward to providing valuable insights and perspectives on financial topics that matter to you.

We also want to keep you informed about upcoming events and activities, such as community events, educational seminars and charitable initiatives. We hope you enjoy this newsletter and welcome your feedback and suggestions for future editions.

### Team member spotlight: Kaylee Birmann

Kaylee joined Northbound Group in 2021 as our operations manager. She handles our day-to-day practice operations, including marketing, maintaining our client experience and assisting with business planning. In her free time, she enjoys gardening and mountain biking with her husband, Taylor.



### Congratulations, Alex

Financial Advisor Alexandra Eisenberger recently earned the CERTIFIED FINANCIAL PLANNER™ certification granted by the Certified Financial Planner Board of Standards, Inc. (CFP Board).

The CFP® designation is a professional certification for financial professionals who have completed extensive training and experience requirements and are held to rigorous ethical standards. The financial planning topics include general principles of finance, insurance, employee benefits, investments



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and securities, state and federal income taxes, retirement, and estate and asset protection.

To receive the CFP® designation, candidates must successfully complete the CFP® education program, pass the final exam and meet experience requirements and ethics standards. Continuing education requirements to maintain the CFP® designation must be satisfied every two years.

“Becoming a CERTIFIED FINANCIAL PLANNER™ professional has equipped me with valuable skills, knowledge and real-world experience that I can apply to my work every day,” said Alex. “I look forward to supporting our clients on their financial journey and helping them develop strategies to achieve their most important financial goals.”



## Mission XX—U.P. Honor Flight 2023

Financial Advisor Brian Pahnke accompanied 78 veterans from the U.P. to embark on Mission XX earlier this year. They toured war memorials built in their honor while making new connections and rekindling old friendships.



Over the past 11 years, U.P. Honor Flights have allowed hundreds of veterans to pay tribute to their brothers and sisters and build comradery through visits to war memorials.

The thanks they may have never been given also rang loud and clear during Mission XX and will continue well into the future.

To learn more about the U.P. Honor Flight, visit [uphonorflight.org](http://uphonorflight.org).

## Bringing generosity to life by dancing

Our team believes in community engagement and focuses on living generously as often as we can. This past May, Kaylee and her husband were nominated to be “stars” in a fundraising and dance competition benefiting the U.P. Hospice Foundation.

They were paired with a dance professional and randomly selected to do a hip-hop routine as the infamous Joker and Harley Quinn from Batman. On the first night of performances, Kaylee and her husband won the congeniality award for their positivity and comradery amongst the seven other couples dancing.

In collaboration with the Thrivent Member Network, Kaylee also hosted three successful fundraising events this year: a family-friendly Easter egg hunt, a Thrivent CANS Hunger drive and a Mother’s Day brunch with a build-your-own-bouquet bar. Through these efforts, more than \$16,000 was raised for U.P. Home Health and Hospice.

Hospice care has touched each of our lives, and it’s truly a gift to give back to an organization that has directly impacted our team.

To learn more about the U.P. Hospice Foundation and U.P. Home Health and Hospice, visit [uphomehealth.org](http://uphomehealth.org).



## Thrivent Choice®

We would like to remind you to designate your Thrivent Choice Dollars® to the charity of your choice before the March 31, 2024, deadline.

Thrivent Choice is a charitable grant program that allows clients and others to contribute to organizations and causes they care about. In this way, eligible clients with membership can influence how Thrivent distributes some of its charitable funding.

## Thrivent Action Teams

**One million projects strong.  
Mighty community impact.**

We all want to give back, but sometimes it's hard to know where to begin. If you're wondering how you can make a difference, we can help. Thrivent Action Teams are a great way to make a positive impact in your community.

Simply gather a team of neighbors or friends for a fundraiser, educational event or service activity.



To learn more about this membership benefit, visit [thrivent.com/about-us/membership/thrivent-action-teams](https://thrivent.com/about-us/membership/thrivent-action-teams).

### Do you know someone who would enjoy receiving this newsletter?

Feel free to forward it or have that person contact us for a copy at [northboundgroup@thrivent.com](mailto:northboundgroup@thrivent.com).



Save the date

### September

**Tuesday, September 5**

Brian's birthday

### November

**Wednesday, November 1**

Get to know Money Canvas.

[Sign up here.](#)

**Wednesday, November 23 and**

**Thursday, November 24**

Thanksgiving, all offices closed

### December

**Friday, December 1**

Thrivent Pre-Parade Party at 5:30 p.m.

Escanaba Christmas Parade at 7 p.m.

### January

**Monday, January 2**

New Year's Day

Offices closed

U.P. Hospice Foundation, U.P. Home Health and Hospice and U.P. Honor Flight are not affiliated or endorsed by Thrivent.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

The Thrivent Choice® charitable grant program engages Thrivent members 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](https://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.

Thrivent is the marketing name for Thrivent Financial for Lutherans. Insurance products issued by Thrivent. Not available in all states. Securities and investment advisory services offered through Thrivent Investment Management Inc., a registered investment adviser, member FINRA and SIPC, and a subsidiary of Thrivent. Licensed agent/producer of Thrivent. Registered representative of Thrivent Investment Management Inc. Advisory services available through investment adviser representatives only. [Thrivent.com/disclosures](https://thrivent.com/disclosures).



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Fall 2023

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