

# Third Coast News

Spring 2025



Your goals,  
our strategy.  
Together, building  
lasting legacies.

Third Coast Wealth Advisors' mission is to serve our clients by providing sound, ethical advice, enabling them to achieve their financial goals and impact future generations and communities.

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

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## Greetings!

As I write this, February is wrapping up and the anticipation of spring is building. During the holiday season our team spent a lot of time reflecting on the many blessings that we have been given, none more important than God's greatest blessing, His Son Jesus. What a great way to bring in the new year. The start of a new year always brings a sense of anticipation for the adventures ahead, and that couldn't be truer for us in the office. With family events like weddings, charity events such as our Live Your Best Life golf outing, and the incredible opportunity to do life alongside each of you, we're excited for what's to come.

At home, my wife, Mel, and I have recently embarked on the new adventure of becoming parents: We were blessed to welcome our son, Brooks Joel Van Ess, into the world on November 22, 2024. Brooks is a happy and healthy little baby who brings an incredible amount of joy to our family. With Brook's giggles, snuggles, growth, dirty diapers, and occasional rough nights of sleep, we are reminded once again of how good God is!

Exactly two weeks after Brooks was born, Office Professional Kim Hendrikse took on a new title ... Grandma! Kim and her husband, Chris, welcomed their first grandchild, Viviana, into the world on December 6, 2024. It is an understatement to say that Kim is enjoying this new role.

Here in the office, we're all excited about 2025. Our financial advisors are eager to engage in holistic financial planning with both new and returning clients. We are always striving to better ourselves in our pursuit of providing you with the best possible experience. A recent example of this is Practice Support Associate Anne Hendrikse, who has worked tirelessly to obtain her Series 7 and 66 licenses—congratulations, Anne!

We also look forward to welcoming our summer intern, Insurance Support Associate Will Grasse, back into the office after he finishes another great year at Grand Canyon University.

On the macroeconomic front, our country has recently experienced a transition of leadership within the White House, and tax season is now in full swing. Taxes play a crucial role in your financial plan, and there is so much that can be done to minimize the tax burden on you and your family—both now and in the future—through strategic financial planning. Please do not hesitate to reach out to your financial advisor should you have any questions. We are here to help in any way we can.

I send you all my best as we enter this Easter season and thank you for the confidence you have in Third Coast Wealth Advisors. We look forward to seeing you soon.

Brayden Van Ess  
Financial Associate



Scan to visit  
our website

## Amplify generosity in 2025

Generosity and stewardship are at the heart of the Third Coast Wealth Advisors team. We are passionate about empowering our clients and community to connect, give back and celebrate their impact.

We want to hear from you—whether you serve on a nonprofit board, donate to a charity or volunteer in your community, your stories are inspiring to us.

### Where will you direct your Thrivent Choice Dollars® this year?

If you have Thrivent Choice Dollars and know where you'd like to direct them, you can call our office, ask for Nicole and she can get them sent to the organization of your choice. Remember the deadline to direct Choice Dollars is March 31.



### How will you use your Thrivent Action Teams?

Thrivent Action Teams can bring your passion for living generously to life and help your community. Learn more at [thrivent.com/actionteam](https://thrivent.com/actionteam).

Watch our Facebook page for ideas and giveaways when you host an Action Team.

## Taxes

We strive to give our clients a personalized financial planning experience. As part of that experience, we ask you to share a copy of your completed 2024 federal tax return with us. At minimum, having your tax information on file helps us determine the most appropriate federal and state withholdings on taxable withdrawals. For our Dedicated Planning Services clients, we may use your tax information to help develop tax strategies such as Roth conversions, charitable giving, and legacy/estate planning.

To best accomplish this, we ask for a copy of your 2024 federal tax return, including all schedules, by the end of April. You can mail a copy to our office, stop by our office so we can make a copy or [click here](#) to securely upload a copy. Our Sheboygan office hours are Monday–Thursday, 8 a.m. to 4 p.m. and Friday, 8 a.m. to noon.

Have a question about your Thrivent Tax Forms?

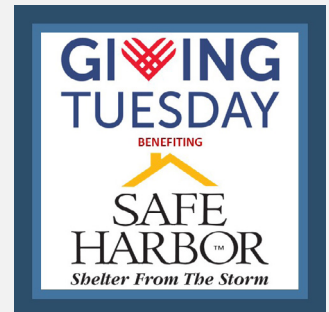
Visit [thrivent.com/tax-resource-center](https://thrivent.com/tax-resource-center) for:

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

## Giving Tuesday results

A big thank you to our generous clients and community!

As a result of our partnerships, through Giving Tuesday, we were able to bless Safe Harbor of Sheboygan County with many needed items and a monetary donation of \$12,517.



Safe Harbor provides prevention education, crisis intervention, emergency shelter and transitional stabilization services to empower community members to live free of violence. It is their goal to create a community where all members can live free of interpersonal violence. “We Are We, Not Just Me.” This value is about humility and solving for others’ needs, not just one’s own. It’s about taking responsibility, sharing success, and recognizing that together, we are better. Safe Harbor relies on support from the community to provide services through their life-changing programs.

## 2024 Traditional IRA, Roth IRA and CESA contributions

Contributions made to your Traditional IRA, Roth IRA or CESA on or before April 15, 2025, can be reported under your 2024 tax filing if you indicate it is a 2024 contribution. Otherwise, it will be reported as a 2025 contribution. Maximum 2024 contribution for Traditional and Roth IRAs (total between both IRA types): \$7,000 (plus a \$1,000 “catch up” contribution if you are 50 or older).

2025 Retirement contribution limit updates: Contribution limits remain \$7,000 (plus a \$1,000 “catch up” contribution if you are 50 or older) for 2025.

Tax filing deadlines: The tax deadline for filing individual 2024 IRS Federal Tax Returns is April 15, 2025. State filing deadlines may vary. October 15 is the final due date for your 2024 Tax Return if you filed for an extension.

## Live Your Best Life 2025 | August 23

Join us on Saturday, August 23rd for a fun and unique golf event supporting Children's Wisconsin's mission of helping the children of Wisconsin to live their best life.



The “Live Your Best Life” Golf Event gives everyone an opportunity to experience The Baths of Blackwolf Run, a world-class par 3, 10-hole golf course and 18-hole putting course, while creating a local opportunity to support Children's Wisconsin and the lifesaving care they offer.

Food and beverages will be provided. Hole contests and prizes, including the chance to win a new car, will challenge you to bring your best game. 100% of the proceeds will be donated to Children's Wisconsin's goal of helping the children of Wisconsin be the healthiest in the nation. We are privileged to support Children's Wisconsin in their mission to offer care, advocacy, research, and education to the children of our community and beyond.

No products will be sold.

## Team accomplishments

We're thrilled to announce that Practice Support Associate Anne Hendrikse has officially passed the Series 66 exam. The exam covers topics in securities regulation and ethical practices, as well as investment products and analysis.



Anne's dedication and hard work have paid off, and we couldn't be more proud of her accomplishment. Join us in congratulating Anne on this incredible milestone!

## Congratulations!



### It's a boy!

We are thrilled to share that our very own financial associate, Brayden Van Ess and his wife, Melanie, welcomed their first son, Brooks Joel, on November 22, 2024.



### It's a girl!

Join us in congratulating Insurance Office Professional Kim Hendrikse and her husband as they became first time grandparents to Viviana Ciela on December 6, 2024.

Our hearts are full of joy as we celebrate these precious new lives.

“Children are a gift from the Lord; they are a reward from him.” —Psalm 127:3

## We're here to help others thrive!

Third Coast Wealth Advisors strives to be first-in-mind as the financial services provider for our clients and prospects because of the expertise, quality of preparation and dependable care our team provides. With humility at the forefront, we spend time cultivating relationships with our clients to define their goals and develop a specialized financial strategy that will meet their needs. We are committed to building strong relationships and delivering a client experience that provides innovative solutions to accomplish their goals. We serve clients at all stages of life. We enjoy working with people that rely on our financial expertise and see the value in the advice we provide. By working with Third Coast Wealth Advisors, you get to work with a team of financial professionals committed to heightening the client experience through shared resources, knowledge, and the use of each of our strength zones.

Our team has more than 100 years of combined experience in the financial services industry. We specialize in comprehensive financial and tax efficiency planning.



We have extensive expertise in estate and retirement proficiencies that provide our clients with the knowledge necessary to pursue and achieve their personal goals.

When you think of individuals that we may be able to assist, we'd be grateful for an introduction. Please share our contact information so they can call or email us to learn more.

Thank you in advance for helping us connect with people who may benefit from purpose-based financial advice.

## Stay connected

Check our team website, Instagram and Facebook for the latest news and upcoming events.

**Website:** [thrivent.com/thirdcoast](https://thrivent.com/thirdcoast)

**Instagram:** [@third\\_coast.thrivent](https://www.instagram.com/third_coast.thrivent)

**Facebook:** [facebook.com/thirdcoastwealthadvisors.thrivent](https://facebook.com/thirdcoastwealthadvisors.thrivent)

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Thrivent and its financial advisors and professionals do not provide legal, accounting or tax advice. Consult your attorney or tax professional.

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.

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