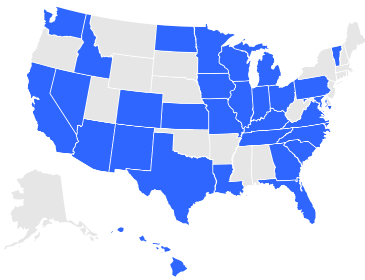
Let’s connect

thrivent.com/unitywealth

Main office
1411 Opus Pl., Ste. 210, Downers Grove, IL 60515
630-598-2103
Mon.–Thurs.: 8:30 a.m. to 4 p.m. Fri.: 8:30 a.m. to 3 p.m.

Libertyville office
1590 S. Milwaukee Ave., Ste. 205, Libertyville, IL 60048
630-598-2103
Mon.–Thurs.: 8:30 a.m. to 4 p.m. Fri.: 8:30 a.m. to 3 p.m.



Our team serves clients nationally and is licensed in:

AZ	IL	MO	TN
CA	IN	NC	TX
CO	KS	ND	VA
FL	KY	NM	VT
GA	LA	NV	WA
HI	MA	OH	WI
IA	MI	PA	
ID	MN	SC	

As of November 2024.

$179 billion assets under management/ advisement*

Rated by:
AM Best, Moody’s Investors Service and S&P Global Ratings[1]

Serving 2.4 million clients

ETHISPHERE®
WORLD’S MOST ETHICAL COMPANIES®
2012 - 2024

*As of Dec. 31, 2023.

[1]For information on each rating, visit the individual rating agency’s website. Ratings are based on Thrivent’s financial strength and claims-paying ability but do not apply to investment product performance.

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Not all team members can provide all products, programs and services in all states.

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.

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. Thrivent.com/disclosures.

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Unity Wealth Advisor Group

Uniting families and finance through holistic planning

We aim to simplify your lives by providing personal and comprehensive service for all your financial service needs. We proudly serve as your main contact and take the extra time and care to support and guide you through anything you may need.

thrivent®

How we work with you

Unity Wealth Advisor Group has more than 120 years of combined experience working for our clients and their financial goals. Together, we have the expertise and experience to guide individuals through every stage of life's financial journey. Our team capitalizes on the importance of implementing a wisely crafted strategy to transfer assets in a tax-efficient manner, allowing clients to pass down all they can to those they love.

Pursuing your financial goals, together

When you work with us, your goals are at the center of the experience. By getting to know your complete financial picture, we can see where you are now and what steps are needed to get you where you want to be. You can expect a collaborative process as we:

Understand
Where you are today and where you want to be tomorrow.

Strategize
Based on your unique situation.

Implement
Ideas aligned with your goals.

Adapt
To life changes and celebrate progress.

Our team

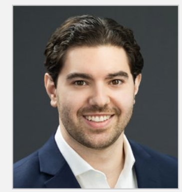
Brian Anderson, ChFC®, FIC
Wealth Advisor
AR Insurance Lic. #824992
CA Insurance Lic. #0E36693
Brian graduated from college in 1990 and immediately started his career at Thrivent. He provides sound advice regarding financial planning and investment expertise, and offers a holistic picture whether you are just starting out or preparing for a meaningful retirement. Brian works alongside his clients to educate and help them find the best way to reach their goals. He values integrity, truth, security, loyalty and growth over comfort. He and his wife, Sheri, have two adult children, Josh and Annika. Brian is an avid fisherman and enjoys watching sports.

Stan Kottke, LUTCF®, RICP®
Associate
Stan has been with Thrivent since 1974 and joined the Unity Wealth Advisor team in 2020. He counsels and advises prospective and current members on suitable financial products and investment advisory services. Stan also explains, discusses and interprets insurance coverage, analyzes exposures or policies, and provides recommendations to clients. He and his wife, Ruth, have three children and two grandchildren.

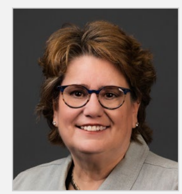
Jim Allen, FIC, RICP®
Associate
Jim started his career in the financial services industry in 1994 and joined Thrivent in 2015. He enjoys working with clients to help them figure out and achieve their financial goals with a focus on insurance, investments, retirement distribution and tax-efficiencies. Jim and his wife, Janell, have two adult children. Jim likes hanging out with family and friends, and following Chicago sports teams. Go White Sox!

Annika Anderson
Director of Operations
Annika started with the team in 2017 and became full time in 2024. She supports the overall function and performance of operations for the team. Annika graduated from Gustavus Adolphus College in 2024 with a degree in economics. In her free time, she enjoys travel and time at the cabin.

Brent Bartell
Investment Analyst
Brent started his career in the investment industry in 1989, including 18 years at the Chicago Board of Trade, and joined Thrivent in 2006. He performs equity and fixed income analysis, assists with wealth management operations, supports wealth advisors, performs due-diligence, researches and builds advisor portfolio models, generates brokerage applications, and performs trading activities. Brent enjoys discussing markets and economic research with clients and lives in the Chicago area.



Dominic Tommasone
Financial Advisor
Dom started his career in financial services in 2022 and has been with Thrivent since 2023. He enjoys helping others achieve their goals and plan for the future by using his knowledge in financial products and investment experience. Dom was a student athlete (gymnastics) at the University of Iowa and graduated in 2022. In his free time, he enjoys traveling, watching sports and hanging out with family.



Beth Steeno
Practice Support Associate
Beth has been with Thrivent since 2009. She supports Brian and the team, and serves as a key player in managing client relations. Beth performs daily operations of the practice, including securities and insurance-related tasks, and other administrative duties. She and her husband, Patrick, have three grown children.

Cindy Zoellick
Insurance Office Professional
Cindy has worked in the industry for nine years and joined the Unity Wealth Advisor team in 2022. She supports the daily operations of the practice with scheduling, coordinating and processing forms. Cindy generates requested Salesforce reports, greets and directs all incoming phone calls. Cindy and her husband, Jeff, have two grown children. She enjoys reading and traveling to visit her children.