Vista Point Wealth Advisors

thrivent

Vista Point News

September 2026

Our team

Our team specializes in retirement income planning, investment management, tax efficient-financial strategies, wealth transfer strategies and generosity.

At Vista Point Wealth Advisors, we spend time getting to know our clients as individuals, including incorporating their values into their financial objectives. We pride ourselves on providing unparalleled customer service.

thrivent.com/vistapoint

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Greetings from Vista Point Wealth Advisors

Summer often gives us a chance to slow down and reflect, making it an ideal time for a mid-year financial check-in. While reviewing investments and retirement goals is always important, some of the most valuable updates are often the simplest.

Take a few moments to confirm that your contact information is current and review your beneficiary designations on retirement accounts, insurance policies and other assets. Life changes can happen quickly, and keeping these details up to date helps ensure your wishes are carried out as intended.

If it's been a while since we've connected, we'd be happy to help you review your plan and make sure everything remains aligned with your goals. As always, thank you for your confidence and the opportunity to be part of your financial journey.

Movie with a purpose: How our clients helped support HopeKids

In June, Vista Point Wealth Advisors had the pleasure of hosting clients, family, and friends for a special opening-day showing of "Toy Story 5." The event brought together multiple generations to enjoy one of the summer's most anticipated movie releases while creating lasting memories with those we value most.

The afternoon also served as a Thrivent Action Team project through our HopeKids Arizona Toy Drive. Thanks to the generosity of those who attended, we collected toys that will help bring joy and encouragement to children and families facing serious medical challenges.

One of the unique benefits available to Thrivent clients and members is the opportunity to lead Action Team projects that support the causes they care about. While our project focused on collecting toys for HopeKids, Action Teams can take many forms, including food drives, school supply collections, community clean-up projects, care package assemblies, volunteer service events and other efforts that bring people together to make a difference.

We are incredibly grateful to everyone who attended, donated and supported this event. It was a wonderful example of how a fun family outing can also create a positive impact in our community. Thank you for helping us turn an afternoon at the movies into an opportunity to share generosity and hope with others.

Together, we truly showed that small acts of kindness can have a big impact.

Meet our team

Brian Brooks, CFP®, ChFC, FICF, FIC, CKA®
Wealth Advisor

Nick Goins, BFA™
Financial Advisor

Dylan Skov
Financial Advisor

Nolan Brooks, MBA
Financial Advisor

Scott Byrdy, CFA®
Director of Investment Operations

Lisa Shillingburg
Operations Manager

Jessi Christie
Practice Support Associate

Cire Gottdiner
Client Service Administrator

The five phases of an IRA

At some point, every retirement saver experiences a shift in mindset. For years, the focus is on saving, investing and growing retirement assets. Then retirement arrives, and the focus changes to generating income, managing taxes, and ultimately deciding how those assets will impact future generations.

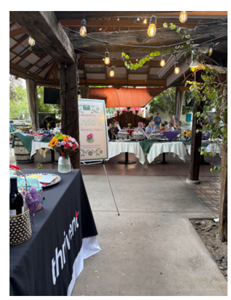
Understanding the five phases of an IRA can help you make more informed decisions throughout each stage of retirement. From accumulation and growth to distributions and legacy planning, each phase presents unique opportunities and challenges. By recognizing where you are today and preparing for what comes next, you can better position yourself to make the most of your retirement savings.

During a retirement planning meeting we can explore together:

- How the five phases of an IRA align with the different stages of retirement.
- Why time is one of the most powerful factors affecting tax-deferred retirement accounts.
- Strategies that may help reduce taxes for both you and your heirs.

Whether you're still building your nest egg, approaching retirement, or already taking distributions, understanding these phases can help you maximize opportunities, avoid costly mistakes and create a more tax-efficient retirement strategy for yourself and those you love.

Celebrating Linda Reidenbach's retirement



Recently, we had the joy of celebrating Linda Reidenbach's retirement with many of the clients, friends, family members, and colleagues who have been part of her remarkable journey.

Throughout her career, Linda has built lasting relationships through her dedication, professionalism and genuine care for the people she serves. Her impact on our clients, community and team has been immeasurable, and it was a privilege to gather to recognize her many contributions and celebrate this special milestone.

While Linda is officially retiring from full-time work, we're delighted to share that she isn't going far. Linda will continue to be part of the Vista Point Wealth Advisors family as an associate financial advisor, allowing her to remain connected with clients while enjoying the flexibility and opportunities that retirement brings.

We are grateful for Linda's years of service, friendship and commitment, and we look forward to continuing to work alongside her in this new chapter. Please join us in congratulating Linda on this well-deserved retirement and wishing her many blessings as she embraces all that lies ahead.

Wrap up

Thank you for being part of our Vista Point family

As we wrap up this edition of our newsletter, we want to express our sincere gratitude for the trust you place in our team. It is a privilege to walk alongside you as you pursue your financial goals, navigate life's transitions and plan for the future.

At Vista Point Wealth Advisors, our mission is about more than finances. It's about building lasting relationships, serving our community, and helping our clients live with confidence and purpose. Whether we recently connected at an event, met for a review, or simply exchanged a quick phone call, we appreciate the opportunity to serve you.

If you have friends, family members, coworkers, or loved ones who could benefit from a conversation about their financial future, we'd be honored to help. Referrals are one of the greatest compliments we can receive, and we welcome the opportunity to serve the people who matter most to you.

Thank you for being part of the Vista Point Wealth Advisors family. We wish you a wonderful end to summer and look forward to staying connected in the months ahead.

With gratitude,

The Vista Point Wealth Advisors Team

Faith • Family • Integrity • Generosity • Service

Consolidate your retirement accounts

We know keeping tabs on multiple 401(k)s isn't always easy. We can help.

Combining accounts into one manageable IRA can provide more control over your money. When you simplify, you can avoid overlooking plan statements or changes. Plus, it may help you steer clear of unnecessary fees.

Keep in mind that there are perks and potential drawbacks to this strategy, so let's explore what's best for your needs and goals.

Contact us to discuss your IRA options.

Let's connect

Website: **thrivent.com/vistapoint**
Facebook: **facebook.com/Vista.Point.Wealth.Advisors.Thrivent**