Your Journey Financial Advisors

thrivent

Newsletter

Second Quarter June 2024

Our values

Build relationships

Serve with purpose

Provide excellent advice

Be accountable

thrivent.com/yourjourney

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Faithful guides on your financial journey

At Your Journey Financial Advisors, we are passionate about forging deep relationships with our clients. We are knowledgeable professionals who take a caring and holistic approach to helping you reach your financial goals.

Our mission is to help you and your family plan for today's needs and tomorrow's opportunities.

By connecting your values with what is most important to you, we provide thoughtful advice and focused planning to help you achieve confidence, clarity and contentment for generations to come.

Do you know anyone who could use some financial guidance? We are honored to serve you and appreciate your trust. A referral from you is the best compliment we can receive, and we would be honored to work with the people you care about.

How can you prepare for the legacy you want to leave?

Estate planning is about leaving the legacy you want for who or whatever is important to you. It's never too early to start thinking about how your assets can help secure your family's future after you're gone, or how you want to continue to support an organization you're passionate about.

Estate planning is all about making your wishes clear and helping ensure your intentions will be honored. **Read this article** to learn more about important considerations for estate planning, and then let's talk about the legacy you want to leave.

Our impact*

Client and community impact

2,825
Thrivent Action Teams.

1,815
Thrivent Choice®
participants.

328,393
Thrivent Action Team, Charitable and Thrivent Community event volunteer hours.

39,494
Thrivent Action Team leaders and volunteers.

Financial impact

$6,542,323
Thrivent Choice Dollars® directed, online personal donations, Thrivent Action Team funds raised, Charitable and Thrivent Community events funds raised, Thrivent Charitable grants, Thrivent Action Team seed funds and total value of volunteer hours.

Total impact

$16,985,220
Financial impact, Thrivent Action Team seed funds, and total value of volunteer hours.

*From 2010 to November 2023.

Create a charitable giving plan with tax-smart benefits

Charitable giving can help you gain a greater sense of gratitude for what you've earned. Giving generously to your family, community and society can also be a key part of a tax-efficient financial strategy.

Giving back provides personal satisfaction, helps make the world a better place, shows your gratitude, and shares your values. **Read this article** to learn more about purposeful giving, and then let's talk about how you can integrate giving with your financial goals.

Summer vibes with YJ: hot spots, cool eats and must do's

Southport, North Carolina/Oak Island has a small-town feel with plenty to do.

Niki and dog, Jaxen, enjoying an afternoon at the American Fish Company in Southport.

Niki and her family love eating at Provision and Company and at dusk take the lantern-led Ghost Walk Tour with Old South Tour Company.

Every year Alisa's family looks forward to getting homemade ice cream at the BEST little ice cream shop, Lil & John's Sweet Treat Ice Cream Parlor in Oak Island.

Jeannie and her friends tubing on the French Broad River.

Also, the grown-ups love stopping in for a drink at their favorite outdoor bar, American Fish Company, and the little boys always look forward to filling up a bag of candy by the pound at The Christmas House in Southport.

Jennifer and her family try out different beach towns in North Carolina and South Carolina. This year they're giving Nags Head a try. We hope to hear back on some fun things to do out there.

Other team members like to keep it more local. Jeannie and her family enjoy tubing on the French Broad River and the New River. Their days are complete with grilling out and spending time with friends and family. They also take in live music at local breweries such as Lake Norman Brewery, Novel Taproom or Royal Bliss.

Colby is interested in anything that involves water. It doesn't matter if it's a lake, stream or on the coast! One of his favorite spots is the Florida Keys and their famous Key lime pie.

Upcoming events

All webinars are held via Zoom. Once you RSVP for the webinar, you will receive the Zoom information. **No products will be sold at these events.**

Questions? Please contact us at 704-525-2657.

Virtual Market Review with Chris Leslie

Tuesday, June 4 at 12 noon
Register now

Wednesday, October 9 at 12 noon
Register now

Navigating the highs and lows of the market
Do you have the information you need to invest with greater confidence?

These workshops are hosted by Your Journey Financial Advisors.

No products will be sold.

Your Journey out and about

Thrivent Business Development Conference 2024
In January, the Your Journey advisors traveled to Texas to participate in the Thrivent Business Development Conference. The 2024 conference helped kick-start the year and energize the financial advisors to have the right mindset, focus on the positives in their practice, and take advantage of available resources. While attending, Kelly was a keynote speaker where she discussed charitable giving.

Foothills Veterans Stand Down
The team visited Catawba Valley Community College and served lunch to over 500 veterans. The event also provided medical services, clothing, educational resources, community resources and employment counseling through Foothills Veterans Helping Veterans.

Lauren Daigle concert
The Your Journey ladies enjoyed a night out at contemporary Christian singer-songwriter, Lauren Daigle's Kaleidoscope Tour in Charlotte, North Carolina.

Important Dates

Friday, June 21
Offices closed

Thursday, July 4
Independence day
Offices closed July 4–5

Monday, September 2
Labor Day
Offices closed

Thursday, November 28
Thanksgiving
Offices close
November 28–29

Wednesday,
December 25
Christmas
Offices closed
December 25–26

Stay connected

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Meet the team

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