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Financial Planning Your Way

Getting a holistic picture of your finances and identifying your next steps isn't always easy or clear. That's why I'm here to provide the expertise and support you need.

As a financial professional licensed to offer advisory services, I can take a comprehensive look at your financial landscape and craft a plan to help ensure you're well positioned to reach your goals.

Together, we can explore how you can:

- Help strengthen your financial position.
- Protect your financial future.
- Plan for long-term care expenses.
- Invest with purpose and manage your assets.
- Explore more tax-efficient ways to manage your money.*
- Save and prepare for income in retirement.
- Pay for college or education expenses.
- Plan to pass on a meaningful legacy.
- Make a difference, locally or globally.
- Address your advanced estate planning needs.

Education and Experience

- FINRA Series 7 General Securities Representative.
- FINRA Series 66 Uniform Combined State Law.
- Life & Health Insurance License in OH, IN, MI, CA, CO.
- Bachelor's Degree in Secondary Education with a minor in Economics from Indiana Wesleyan University, 2013
- Master of Arts in Higher Education from Geneva College, 2017

Specializations

I specialize in the following:

- Investments
- Life insurance
- Retirement planning
- Education funding strategies
- Risk management
- Goal planning
- Income tax planning
- Estate planning

Personal Profile

- Married to Brooke
- Enjoy spending time with family and friends
- Avid sports enthusiast
- Member of Wooster Area Chamber of Commerce
- Member of Orrville Area Chamber of Commerce

Giving Back

I support the following charities and causes:

- Habitat for Humanity in Wayne County
- Grace Church, Wooster
- Forget-Me-Not Baskets
- Thrivent Action Teams

Who We Are

We exist to help you achieve financial clarity.

At Thrivent, we believe money is a tool, not a goal. Driven by a higher purpose at our core, we are committed to providing financial advice, investments, insurance, banking and generosity programs to help you make the most of all you've been given.

At our heart, we are a membership-owned fraternal organization, as well as a holistic financial services organization, dedicated to serving your unique needs. We focus on your goals and priorities, guiding you towards financial choices that will help you live the life you want today—and tomorrow.

Service You Can Count On

For over 100 years, Thrivent has been helping people build their financial futures and live more generous lives. Today, we're a Fortune 500 company, offering a full range of expert financial solutions, serving over 2 million clients, as well as the communities in which they live and work.



\$152 billion assets under management/ advisement*



A++ | A.M. Best Superior

Highest of 16 ratings¹
May 2019 • AMBest.com



AA+ | Fitch Ratings Very Strong

Second highest of 19 ratings¹ • May 2019



Thrivent and its financial professionals do not provide legal, accounting or tax advice. Consult your attorney or tax professional. *As of Dec. 31, 2019.

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