Toledo Area Associates

thrivent

Helping provide world-class financial services for our clients' needs

We are faith-oriented and treat everyone with dignity and respect. Our goal is to create an environment where people choose to work and have joy in their job. We embrace integrity and trust in each other, and this helps us be effective and achieve consensus in making important decisions for our team and our clients.

We invest our time in learning more about you and your loved ones. Our financial expertise and comprehensive advice help you see where you stand today, tomorrow and beyond.

Objective advice

No matter what stage in life, you can depend on us to help you navigate the complex choices and challenges that planning for the future brings. We offer comprehensive solutions and strategies to help integrate all your interests—family, business, lifestyle and philanthropy. By working together and taking a personalized approach to exploring your financial goals and priorities, our guidance helps inspire you to make thoughtful choices and encourages you to live the life you envision.

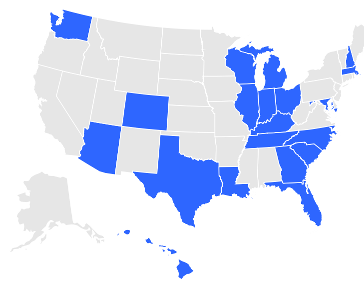
Let's connect

thrivent.com/toledo
toledoareaassociates@thrivent.com

Perrysburg office
1070 Commerce Dr.
Bldg. 2, Ste. 302
Perrysburg, OH 43551
419-874-4378

Carleton office
12640 Grafton Rd.
Carleton, MI 48117
734-869-2122

Oak Harbor office
161 W. Water St.
Oak Harbor, OH 43449
419-874-4378



Our team serves clients nationally and is licensed in:

AZ	MD
CO	MI
FL	NC
GA	NH
HI	OH
IL	SC
IN	TN
KY	TX
LA	WA
MA	WI

As of June 2024.

How we work with you

We are dedicated to delivering the customized strategies and attentive service you deserve. When you work with us, the experience is as much about helping you fulfill your values and sense of purpose as it is about achieving your financial objectives. We are passionate about inspiring you to achieve new possibilities and we are with you every step of the way—helping you find the right path for your journey.

Financial services

- Free portfolio reviews: asset allocation, diversification and risk analysis.
- Comprehensive personalized financial analysis.
- Retirement income strategies.
- Tax-efficiency and charitable gift strategies.
- Estate protection strategies.
- Business retirement plans: 401(k), SIMPLE IRA and SEP, nonqualified plans.

Investment management

- Rollovers: IRAs, 401(k), 403(b), 457 Plans, deferred compensation, profit sharing.
- IRAs: Roth, traditional, Roth conversions.
- Managed accounts: investment advisory services.
- Annuities: immediate and deferred, fixed and variable, fixed indexed annuities.
- Mutual funds.
- College funding: 529 Plans.

Risk management

- Life insurance: term, whole life, universal, variable universal.
- Disability income insurance: long term, short term.
- Long term care.

Genuine relationships

We forge deep, long-term relationships built through meaningful conversations with you and your family, to better understand your unique expectations, concerns, goals and priorities in a way that reflects your values and aspirations. We then help you realize your life vision and focus on what's most important to you—be it the success of your family, personal achievements, or the legacy you want to leave for the people and causes you care about most.

Our team

Partnering with you to create a financial roadmap centered around your unique goals and values.

Ron Ashley, FIC, Financial Consultant
ron.ashley@thrivent.com
Perrysburg and Carleton offices

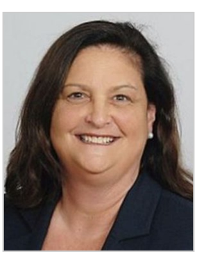
Ron is our team leader of Toledo Area Associates and has been a financial advisor for more than 22 years. He holds the Series 7 and 66 securities licenses, and life and health insurance licenses. He was inducted into the Thrivent Hall of Fame in 2022. Ron graduated from Illinois State University with a Bachelor of Science degree. Ron and his wife, Judy, are members of Trinity Lutheran Church in Toledo, Ohio. They enjoy spending time with their two children and four grandchildren. In his free time, Ron also enjoys playing golf, fishing and participating in fantasy football.

Robert Brunner, FIC, RICP®, CLTC®, Financial Consultant
rob.brunner@thrivent.com
Perrysburg and Carleton offices

Rob has been a financial advisor for 13 years. He holds the Series 7 and 66 securities licenses, and life and health insurance licenses. He also passed the Level 1 CFA Exam in December 2019. Rob graduated from Bowling Green State University with a Bachelor of Science degree in finance. Rob and his wife, Michelle, have two daughters. In his free time, Rob enjoys sailing, golf and photography.

Jeremy Ashley, FIC, CLTC®, Financial Advisor
jeremy.ashley@thrivent.com
Perrysburg, Carleton and Oak Harbor offices

Jeremy has been a financial advisor for 10 years. He holds the Series 7 and 66 securities licenses, and life and health insurance licenses. Jeremy graduated from Tiffin University with a bachelor's degree in business. Jeremy and his wife, Sarah, have two beautiful daughters. They attend Trinity Lutheran Church in Toledo, Ohio. In his free time, Jeremy enjoys fishing, golf, soccer and fantasy football.



Susan Minch, FIC, CLTC®, Financial Associate
susan.minch@thrivent.com
Perrysburg office

Susan has been a financial advisor for 20 years. She holds the Series 7 and 66 securities licenses, and life and health insurance licenses. Susan graduated from Ball State University, Miller College of Business, with a Bachelor of Science degree. Susan has one amazing daughter. She is a member of Zoar Lutheran Church in Perrysburg, Ohio. Susan enjoys volunteering, reading and painting.

Dohn (Blair) Dyke, Associate
dohn.dyke@thrivent.com
Perrysburg office

Blair has more than 10 years of experience in financial services. He holds the Series 6 and 63 securities licenses, and life and health insurance licenses. Blair graduated from Owens College with an associate's degree in business and from Lourdes University with a bachelor's degree in business. Blair is married to Amy. He looks forward to helping others with their financial journey and his motto is "Be the lighthouse for others!"

Judy Ashley
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Sarah Ashley
Practice Support Associate
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Nancy Dowler
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Lesli Brothers
Office Professional
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Service you can count on

For more than 120 years, Thrivent has helped 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 more than 2.3 million clients as well as the communities in which they live and work.

$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

Thrivent was named one of the "World's Most Ethical Companies" by the Ethisphere Institute for 13 years in a row.

*As of Dec. 31, 2023.

[1]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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