Voyage Financial Advisors

thrivent

What differentiates Voyage Financial Advisors is our common sense purpose, brought to life by uncommon passion. Our team features innovative, knowledgeable and compassionate professionals with a shared vision to help our clients achieve their most important financial goals and dreams.

Financial services

- Free portfolio reviews: asset allocation, diversification and risk analysis.[1]
- 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.
- Dedicated planning for a fee.

Investment management

- Rollovers: IRAs, 401(k), 403(b), 457 Plans, deferred compensation, profit sharing.
- IRAs: Roth, traditional, Roth conversions.
- Managed accounts: fee-based investment advisory services.
- Annuities: immediate and deferred, fixed and variable, fixed indexed annuities.
- Mutual funds.
- Individual stocks, bonds and exchange traded funds (ETFs).
- College funding: 529 Plans, Coverdell and custodial accounts.

Risk management

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

Let's connect

715-544-1122

thrivent.com/voyage

voyagefinancialadvisors@thrivent.com

Stevens Point
3233b Business Park Dr.
Stevens Point, WI 54482

Verona
957 Liberty Dr.
Verona, WI 53593

Marshfield
2001 S. Central Ave.
Marshfield, WI 54449

Wausau
3506 Stewart Ave.
Wausau, WI 54401

Neillsville
1031 E. Division St.
Ste. 1B
Neillsville, WI 54456

Wisconsin Rapids
3930 Eighth St. S.
Ste. 204
Wisconsin Rapids, WI 54494

Eau Claire
4330 Golf Terrace
Ste. 216
Eau Claire, WI 54701

Iron River
116 N. Fourth Ave.
Ste. A
Iron River, MI 49935

Office hours

Monday–Thursday 8 a.m. to 4 p.m.
Fridays and evenings by appointment.

In addition, phone and Zoom appointments available.

Financial advisors

Daniel Demers, FIC, RICP®
Financial Advisor
Managing Partner of Voyage Financial Advisors*
Stevens Point, WI
daniel.demers@thrivent.com

Ryan Jones
Financial Advisor
Managing Partner of Voyage Financial Advisors*
Wausau, WI
ryan.jones@thrivent.com

Daniel Weltzin, FLMI, RICP®
Financial Advisor
Stevens Point, WI
daniel.weltzin@thrivent.com

Scott Thompson, FIC, RICP
Associate Financial Advisor
Wausau, WI
scott.thompson@thrivent.com

Clancy Cramer
Financial Advisor
Stevens Point, WI
clancy.cramer@thrivent.com

Beth Oestreich
Associate Financial Advisor
Wausau, WI
elizabeth.oestreich@thrivent.com

Ian Kopp
Associate Financial Advisor
Eau Claire, WI
ian.kopp@thrivent.com

Operations support

Brian Erickson
Director of Operations*
brian.erickson@thrivent.com

Sandy Abel
Securities Support Associate
sandy.abel@thrivent.com

Support staff

Stevens Point, Neillsville and Verona
Tylor Crooks, Insurance Support Associate
Sara Hayakawa, Office Professional
Christina Kleitsch, Office Professional
Jennifer Schneider, Office Professional

Marshfield
Hope Flink, Office Professional

Wisconsin Rapids
Emily Jaeger, Office Professional

Wausau and Eau Claire
Kristina Barbier, Office Professional

Iron River
Kelsie Johnson, Office Professional

Remote
Jacob Lund, Office Professional
Angie Stroik, Office Professional

*Voyage Financial Advisors is a financial services practice of Thrivent.

[1]While diversification can help reduce market risk, it does not eliminate it. Diversification does not ensure a profit or protect against loss in a declining market.

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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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