Ascend National Wealth Advisors

thrivent

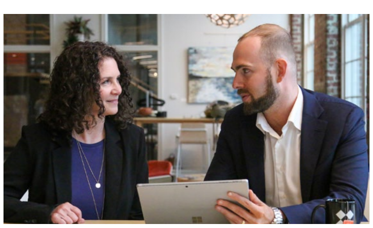
Our philosophy is that true abundance starts by aligning our perspective with the principles of stewardship. This mindset is woven throughout all our services, acknowledging that your financial goals are more than just milestones; they are the stepping stones leading to a life of richer fulfillment and deeper meaning.

In partnership with you, we are dedicated to optimizing the fruits of your labor by seamlessly integrating tax-efficiency into our holistic financial plans, ensuring your hard work yields the greatest possible returns.

Our team

When you choose to work with our team, you gain access to a comprehensive group with financial expertise. Our experienced financial advisors, relationship managers and operations specialists collaborate to provide personalized guidance throughout your financial journey. By having this dedicated team behind you, you receive tailored advice and support, helping you explore and accomplish your financial goals.

[Visit our website](thrivent.com/ascend) to learn more about our team.



Let's connect

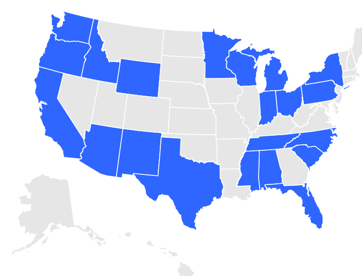
thrivent.com/ascend

Washington
253-271-3290
Bellevue
Gig Harbor
Kirkland
Federal Way

South Carolina
854-225-0005
North Charleston

California
707-341-2021
Santa Rosa

Arizona
602-805-0408
Scottsdale



Our team serves clients nationally and is licensed in:

AL	NY
AZ	OH
CA	OR
FL	PA
ID	SC
IN	TN
MI	TX
MN	WA
MS	WI
NC	WY
NM	

As of June 2024.

How we work with you

Our practice is committed to proactive care at every step of your financial journey. After creating a plan tailored to your needs and values, we aim to give you the confidence of having a team who is working behind the scenes on your behalf. As life changes, we recognize that your goals do too. We will meet regularly to check in with you, provide timely advice and opportunities, and ensure that your plan remains in alignment with your goals.

Specializations

- Dedicated Planning Services
- Tax-efficiency planning
- Investment management
- Retirement planning
- Risk mitigation
- Insurance
- Multi-generational planning
- Generosity and charitable giving
- Small business planning
- Wealth accumulation

> “Each of you should use whatever gift you have received to serve others, as faithful stewards of God’s grace in its various forms.
>
> —1 Peter 4:10

Faith-based guidance

Your faith has always been a guiding light in your life; allow it to illuminate your financial path as well. As we are called to be good stewards, we manage our clients’ portfolios with biblical standards in mind. From charitable giving to ethical investing, we carefully tailor every aspect of your financial plan to align with your faith.

Holistic team approach

Our integrated team, comprised of seasoned financial advisors, operations experts and a dedicated client experience team, helps ensure streamlined service with precision in financial transactions and personalized support. We aim to maximize wealth through comprehensive planning and returning valuable time to our clients.

Family focused

Our firm’s family-oriented philosophy guides us to serve families, regardless of distance. This helps ensure that whether family members are minutes or miles apart, they remain connected and supported in their financial planning for generations to come.