

Newsletter

Spring 2024

Let's connect



Cross Rivers Financial is a team of financial professionals united by common values and a commitment to our clients. From our office in the historic riverfront neighborhood of St. Charles, to the rolling hills of Southeastern Missouri in Frohna, we serve clients who share a common Christian bond throughout the state and country, both personally and through remote access technology. We strive to educate and guide our clients to help them make informed financial decisions that cultivate the kinds of success they envision for themselves, their families and their communities.

thrivent.com/crossrivers

St. Charles

1144 S. Benton Ave.
Saint Charles, MO 63301

Frohna

6267 Main St., P.O. Box 71
Frohna, MO 63748

Cape Girardeau

1918 N. Kingshighway St.
Cape Girardeau, MO 637011



Scan to visit
our website



Giving back

Happy Easter! Recently the team at Cross Rivers Financial hosted a generosity event at the St. Charles office location to benefit children supported by the Foster Adoption Support Team (FAST). The team gathered to fill 36 Easter baskets with treats, which were then wrapped in festive cellophane and bows and delivered to the FAST office down the street. The FAST organization is committed to positively impacting the lives of children and their families who are involved in the foster care system, with an emphasis on keeping siblings together during that time. Learn more about FAST [here](#).

Thrivent encourages members to work together towards a common goal of spreading love while meeting others' needs and supports those efforts through the Thrivent Action Team program. Spreading generosity has never been easier with your Thrivent Action Team Center. Let's work together to help meet the needs of our communities. Learn more about Thrivent Action Teams [here](#).

Meet the Team



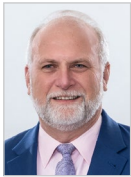
Brent D. Stewart
CFP®, ChFC®, FIC
Wealth Advisor



Tim Gerler
CFP®, FIC, RICP
Wealth Advisor



Boone Jackson
CKA®, FIC
Financial Consultant



Mark Gerler
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Carol Grebing-Duggan
RICP, CLTC®, FIC
Financial Consultant



Zach Gerler
Director of Investment
Operations



Brian D. Wegener
CLTC®, FIC, LUTCF
Associate Wealth Advisor

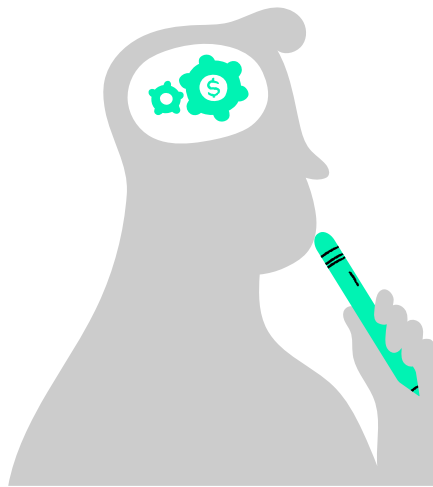


Taylor Stevens
Associate



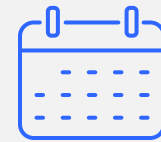
Jason Schoppenhorst
MBA
Investment Analyst

Tax-efficient investing can help you reach your financial goals



Taxes are a part of life. But there are ways you can potentially make them a smaller part. By learning more about each type of tax, you can better understand how they may affect you—so you can start making strategic decisions that impact your taxes now and in the future.

It's important to discuss how tax-savvy strategies could help reduce what you pay now and in retirement. [Read this article](#) for additional details, and then let's talk about your unique situation.



Important dates

Monday, April 15

Tax Day

Monday, April 22

Earth Day

Sunday, May 12

Mother's Day

Monday, May 27

Memorial Day
(offices closed)

Sunday, June 16

Father's Day

Thursday, July 4

Independence Day
(offices closed)

Fitness, fellowship and faith

“The Mission of F3 is to plant, grow and serve small workout groups for men for the invigoration of male community leadership.” For Boone Jackson, the encouragement, inspiration and motivation he has found with F3 has not only helped him grow personally, but also as a leader in his community.

How did you find F3? I had a client recommend I come, and my business partner Tim provided the accountability to go. It had been on my business plan with him to start working out ... accountability!

What was your first experience with the group? The first workout was hard, but we have a motto in F3 to “leave no man behind, but leave no man where you found him.” That day these men rallied behind me. We all started the workout together and ended together.

What has F3 done for you personally? F3, or more precisely the men of F3, have helped me be a better man for my family and community. We promote what we call “Living 3rd.” This means I need to be strong for my family and community and serve them well in that order.

What role have you played in helping the program grow? If our mission is to invigorate male community leadership, we need to have opportunities for others to lead. We have five core principles that every location in F3 abides by. We are free, open to all men, held outdoors (rain or shine, hot or cold), peer led, and we always end in a circle of trust. Each workout needs someone to lead, so that is one way we teach leadership. We then grow sites by asking others to lead and grow them. I have helped open and grow many sites in St. Charles.



What is your favorite element of F3? Being around men when they first come out and realize they need other men in their lives, which is unlike what society sometimes tries to tell them. We cannot do things alone; we must do things together.

What is your dream for the program? An F3 site in every park and every church in St. Charles.

Name one reason you are passionate about F3? Suicide rates are at an all-time high, and the reality is that the majority are lonely men. This is what we are combating. Men need other men who we can confide in and encourage to be the best we can.



What are the steps someone should take to get involved with a group?

Our workouts are the same times every week, just show up. We help with the rest. Visit f3nation.com to find a location near you.

Stay connected

Check our team website and Facebook page for the latest news and upcoming events.

Website: thrivent.com/crossrivers

Facebook: facebook.com/crossriversfinancial

Email: crossriversfinancial@thrivent.com

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