



Experienced guidance for life's transitions

Our team is built on the core values of expertise, faith and service—which is why a cornerstone to working with us involves helping you find opportunities to live generously and help others. We believe happiness and contentment come from living a generous and purposeful life, and we want to help you be a steward of your many blessings.

Our mission is to help you make the most of all you've been given, so you can live a life rich in meaning and gratitude. Our faith is what fuels us and we enjoy serving the community and providing help where it's needed through participation in Thrivent Action Teams and other Thrivent generosity initiatives.

Let's connect

thrivent.com/emerald

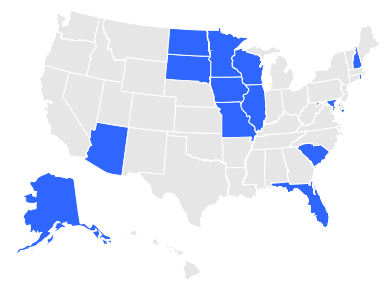
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Operating hours: Monday–Thursday, 8 a.m. to 5 p.m.
Friday, 8 a.m. to 12 noon



Our team serves clients nationally and is licensed in:

AK	MO
AZ	ND
FL	NH
IA	RI
IL	SC
MD	SD
MN	WI

As of June 2024.

How we work with you

We value building relationships with our clients—not just doing business. That's why we start from wherever you are on your financial path and focus on your values to move forward. You can depend on us to provide comprehensive financial guidance that reflects your faith, goals and values.

Because we see money as a tool and not a goal, our mission is to help Christians make wise financial choices and live generously. We strive to help all our clients put empathy and care into action, so you can build a brighter future for yourself, your family and your community.

Pursuing your financial goals, together

When you work with us, your goals are at the center of the experience. By getting to know your complete financial picture, we can see where you are now and what steps are needed to get you where you want to be. You can expect a collaborative process as we:

Understand

Where you are today and where you want to be tomorrow.

Strategize

Based on your unique situation.

Implement

Ideas aligned with your goals.

Adapt

To life changes and celebrate progress.



Our team



Eric Funk, FIC, CCPS®, CIMA®, Financial Consultant

Eric was referred to Thrivent by the pastor and president of his church. He has been with Thrivent since September 2002 and enjoys his career with Emerald Financial Group. Eric's goal is to better the lives of those who have a relationship with him, be it personally or professionally.

Eric and his wife, Karissa, have two sons. He loves to fish and would fish every day if he could.



Colin Aldis, LUTCF®, FIC, RICP®, CLTC®, CKA®, Associate

Colin joined Thrivent in 1995 and has been helping clients achieve their retirement goals ever since. He feels great knowing that clients have implemented a plan based on the team's advice.

Colin and his wife, Pat, have been married 39 years and have two adult children and eight grandchildren. They enjoy boating in the summer and long walks. Colin is also a member of the Rochester Rotary Club.



Andy Roberts, Associate

Andy joined Thrivent in 2022. He feels that in this ever-growing and complicated industry, if you want to be successful, you need help from an experienced team. Emerald Financial Group has that experience and the team does everything in their power to help each client reach their financial goals.

Andy and his wife, Madison, were born and raised in Rochester and are excited to raise their family in this great town too. They have three children: daughter Evelyn, son Isaac and daughter Charlotte. In his free time, Andy loves being on the lake with his family or on a golf course. In the winter, the family spends a lot of time at the rink, as Andy volunteers and helps coach Rochester youth hockey programs.



Daniel Jordan, Director of Dedicated Planning and Investment Operations

Daniel returned to the financial services industry after a nine-year hiatus as an operations manager in the retail industry. He has more than 15 years of experience in financial services, ranging from leading mutual fund operations teams to underwriting commercial property and casualty insurance. Daniel graduated from the University of Phoenix with a Bachelor of Science degree in management, and he is passionate about building an engaged environment for clients and team members.



Shauna Eastlee, Practice Support Associate

Shauna joined Thrivent in 2011. She found her way to Thrivent after a previous co-worker was hired to work for Emerald Financial Group. The co-worker then referred her when a position opened, and Shauna couldn't turn down the opportunity. She is thankful for the team's great clients and her caring co-workers.

Shauna is married and has two daughters and three grandchildren, plus a dog named Dain. She enjoys spending time at the family cabin with family and friends.



Shauna Schlagenhaft, Licensed Client Service Administrator

Shauna joined Thrivent in 2023. She decided to take the leap from contract human resources to the financial planning world because she needed a new and exciting challenge. Thrivent really stood out to her, and she loved the mission and vision of the company.

Outside of work, Shauna and her husband, Sam, spend most of their time with their families. They travel to Montello, Wisconsin, to see Shauna's parents, and to Finlayson, Minnesota, to see Sam's parents and siblings. Shauna and Sam have been married for three years and they had a baby boy, Easton, in October 2022.



Annie Scholz, Administrative Assistant

Annie joined Emerald Financial Group in 2021. She is proud to be part of the team and grateful for the welcoming community of clients she has had the pleasure of getting to know over the last few years.

In her free time, Annie enjoys time at the cabin, traveling with family and friends, gardening and concerts. Her husband, Steve, works for 3M and her daughter, Olivia, works at Trader Joe's and is going into her second year at RCTC. Annie's son, Jack, will be a senior at John Marshall this year and works at Hy-Vee.



Krystal Hawkins, Director of Operations

Krystal joined the Emerald Financial family with a background in human resources and process development. She landed in the financial industry a few years back by accident and has loved being a part of it ever since.

Krystal and her husband live on a hobby farm in Byron with their four children and an undetermined amount of fur babies. Their family loves to spend time outside enjoying nature, fishing, boating and swimming.

Do you know someone who wants to work in financial services?

We are always open to meeting with people who want to explore a financial advisor career. Our best candidates are often referred to us by someone we know—like you! People you introduce will be contacted for a brief phone call to determine if it makes sense to meet now or down the road. Whether you know someone who is at the beginning their career, would like to change careers or an experienced advisor, we'd love an introduction.

Contact us at emeraldfinancialgroup@thrivent.com.

About Thrivent

Founded on shared beliefs, Thrivent has been helping others live more generous lives while guiding them on their financial path. We are a holistic financial services organization, providing financial advice, investments, insurance, banking and generosity programs to help our clients make the most of all they've been given.

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 2.4 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 Ratings¹



**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.

¹Ratings are based on Thrivent's financial strength and claims-paying ability. Does not apply to investment product performance. For information on each rating, visit the individual rating agency's website.

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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.

Member benefits and programs are not guaranteed contractual benefits. The interpretation of the provisions of these benefits and programs is at the sole discretion of Thrivent. Membership benefits are reviewed and evaluated regularly. Thrivent reserves the right to change, modify, discontinue, or refuse to provide any of the membership benefits or any part of them, at any time.

You should never purchase or keep insurance or annuity products to be eligible for nonguaranteed membership benefits. You should only purchase and keep insurance and annuity products that best meet the financial security needs of you and your family. Consider the cost, features, and benefits of specific insurance and/or annuity products.

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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