

Quarterly Newsletter

March 2025



Experienced guidance
for life's transitions

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our website

Meet Administrative Assistant Lisa Oeltjen

I am a local resident of Rochester, Minnesota, and have been most of my adult life. I grew up on a dairy farm north of Rochester, which taught me that hard work, loyalty and dedication are key characteristics for success. These values are what drew me to Emerald Financial Group. I believe in the company's vision and mission, and I am thrilled to be a part of the team, who openly welcomed me with kindness and generosity.

Before coming to Emerald Financial Group, I was employed by the Mayo Clinic for nearly 25 years as a client service advisor in the department of Media Support Services. I am a graduate of the Minneapolis College of Art and Design, with a degree in art.

My interests include curling up and watching movies, all kinds of music, and I love to sing and play the guitar. My favorite activity is planting flowers in the spring. I also love to spend time with family and friends.

I am married to Troy, my wonderful husband of 29 years. We have been blessed with two beautiful daughters, Chelsey and Olivia. They are now grown and making their mark in the world. My husband and I could not be prouder!



**Our office will
be closed**

Friday, May 23

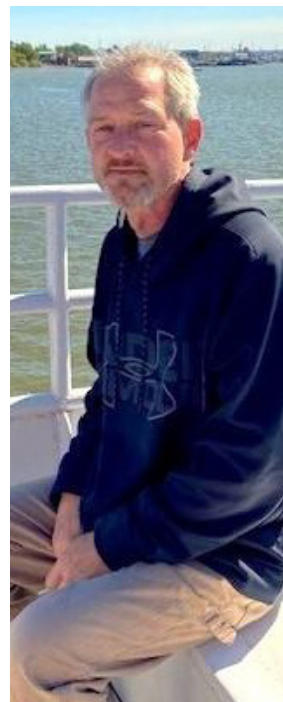
Monday, May 26

Thursday, June 19

Friday, July 4

Friday, August 29

Monday, September 1



Meet the 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.



John Milliron, CFP®, RICP®, Associate

John joined Emerald Financial Group in 2024 after relocating to Rochester from the desert of Phoenix, Arizona. He worked with the military community for 10 years helping them with their financial planning needs and now with Emerald Financial Group, he is excited to help a new community reach retirement worry free. What keeps John motivated to come into work each day is helping clients reach their goals, retire fearlessly and give generously.



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 its power to help clients reach their financial goals.



Shauna Eastlee, Licensed Sr. Client Service Administrator

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.



Annie Scholz, Marketing Coordinator

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.



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 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.



Lisa Oeltjen, Administrative Assistant

Lisa joined the team after previously working at the Mayo Clinic for nearly 25 years. She is a graduate of the Minneapolis College of Art and Design, with a degree in fine art. Lisa and her husband of 30 years have been blessed with two beautiful grown daughters.



Connor Parent, Investment Analyst

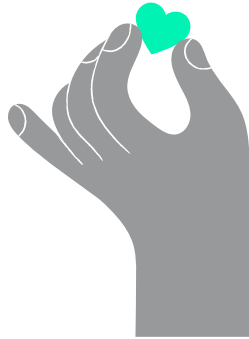
Connor is thrilled to join Emerald Financial Group and looks forward to meeting everyone. He is originally from the east coast, growing up and living in Connecticut for most of his life. After graduating college, Connor accepted a job at IBM here in Rochester. After several years there as an analyst, he decided to make a career change and work in the financial services industry so he can meet and create great relationships with clients.

What is Thrivent Choice®?

Thrivent Choice lets you donate online to causes you care about, and when you do, we pay all processing fees. Eligible clients can also nominate organizations to be part of the program and recommend where Thrivent distributes some of its charitable outreach funds.

Thanks to Thrivent Choice, our clients with membership can contribute to organizations and causes that hold significance for them. Plus, they play a pivotal role in influencing the allocation of Thrivent's charitable grant funding through Choice Dollars®.

To date, Thrivent Choice® has successfully distributed more than \$550 million to churches and nonprofits across the nation, positively impacting many communities.



What is a Thrivent Action Team?

A Thrivent Action Team is a group of community members led by a Thrivent client to complete a fundraiser, educational event or service activity. You submit your project idea through an application. Once approved, we'll send you a Thrivent Action Kit, which can include:

- A Community Impact Card with up to \$250 in seed money.
- A personalized webpage and other digital tools to promote your activity.
- "Live Generously" T-shirts.
- Thank you cards, name tags, stickers and more.

Clients with membership can lead two Thrivent Action Teams per year, and clients with associate membership can lead one team per year. If you need help with your application, call our office at 507-289-1682 and we can walk you through the process.

Please share your Thrivent Action Team success with us. Send your story and picture to annie.scholz@thrivent.com and you may be featured in a future newsletter.

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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.

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