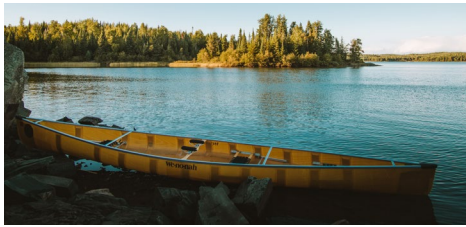


Quarterly Newsletter

October 2024



Experienced guidance for life's transitions

emeraldfinancialgroup@thrivent.com

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Text Eric at 507-322-1370

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116 Elton Hills Ln. N.W., Ste. 200
Rochester, MN 55901



Scan to visit our website

Our office will be closed

November 28 and 29

December 24 and Dec 25

January 1

Meet Associate John Milliron

I moved from the desert of Phoenix, Arizona, to Rochester earlier this year. Having moved here for family, a great bonus was finding out that it's an amazing place to live. I always felt I was a Midwesterner at heart and being here has only solidified this. Everyone is welcoming and there is a great sense of community.

I currently live in Oronoco with my four cats that rule the house and one dog with far too much energy. Being new in town, I am trying to explore everything Rochester and the surrounding areas have to offer. You can find me out taking my dog for a hike, volunteering at a local animal shelter, and finding other ways to get integrated into the community. I look forward to working with all of you.



Meet Insurance Associate Connor Parent

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

My fiancé and I live here in Rochester with our three cats and a dog. Our three cats are each named after characters in some of our favorite movies; their names are Toothless, Meena and Kuzco. Bonus points if you know what movies they are from. Aside from their antics all day, we enjoy taking our pup for walks around town and to the park, as well as taking her on car rides. Having four pets means a lot of cleaning around the house, but once that is taken care of, we like to get out of the house. Whether that be going up to the Twin Cities for a Twins game or a concert, stopping by a brewery or winery, or playing pickleball on the weekends, we are always staying busy. I am so excited to be a part of the team and am eager to meet you.



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.



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.



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, 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.



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.



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.



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.



Connor Parent, Insurance Associate

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.



John Milliron, 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.

Upcoming events

Check out the Events page on our website for the most up-to-date info on upcoming events.

No products will be sold at these events.

Questions? Please contact us at emeraldfinancialgroup@thrivent.com or 507-289-1682.

Upcoming events

5
December

Save the date: Colin Aldis retirement open house

December 5, 9:00 a.m.–3:00 p.m.

**Emerald Financial Group Office
116 Elton Hills Lane NW Suite 200 Rochester, MN 55901**

Stop in for cake, cookies, coffee and conversation!

12
December

Save the date: Adopt-A-Family gift wrapping

December 12, 4:30 p.m.–7 p.m.

Rochester Golf and Country Club

Check website for full details and registration information!

Stay connected

Website: thrivent.com/emerald

Email: emeraldfinancialgroup@thrivent.com

Facebook: facebook.com/EmeraldFinancialGroupThrivent