

# Lakeside Legacy Wealth Advisors News

Fall 2024



## Lakeside Legacy Wealth Advisors

6687 Blue Heron Dr.  
Lino Lakes, MN 55014  
☎ 651-288-7580

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## Summer highlights

Our team enjoyed summer so much, and we hope yours was wonderful as well. Here are some of our highlights:

**Wealth Advisor Mike Trudeau:** Coaching my boys' baseball teams and family time at the cabin.

**Financial Advisor Matt Merrick:** Welcoming our daughter, Nellie, and building a deck on our new family home.

**Wealth Advisor Ben Ollila:** Family walks with Deeks on his bike and Dottie happily in her stroller.

**Financial Advisor Ben Prchal:** First daddy-daughter date with my 3-year-old. We went to the mall for treats and a carousel ride.

**Office Manager Kati Koch:** Attending my first Minnesota Vikings football game.

**Office Professional Abby Nelson:** Hiking the historic Stillwater Stairs.

**Licensed Office Professional Steven Popowitz:** Running Grandma's Marathon in Duluth.

**Team highlight:** A day on the lake enjoying each other's company, the beauty of Minnesota nature and delicious snacks.

## Baby boom

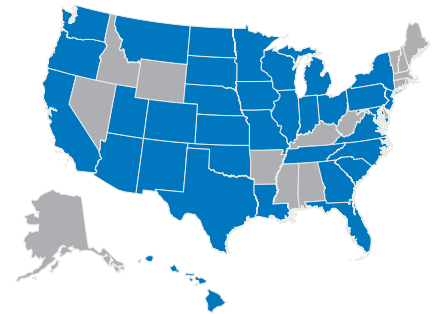
Three of our team’s families recently added a new bundle of joy.

- Ben P. and Britt welcomed baby Wesley.
- Ben O. and Ashley welcomed baby Dottie.
- Matt and Rachel welcomed baby Nellie.

We love our Lakeside Legacy Wealth Advisor littles!



## Our team serves clients nationally and is licensed in:



- |    |    |    |    |    |
|----|----|----|----|----|
| AZ | IL | MO | NY | TN |
| CA | IN | MT | OH | TX |
| CO | KS | NC | OK | UT |
| FL | LA | ND | OR | VA |
| GA | MD | NE | PA | WA |
| HI | MI | NJ | SC | WI |
| IA | MN | NM | SD |    |

As of October 2024.



## Planning ahead

We encourage you to make sure your beneficiaries are up to date. The next time you meet with us, your financial advisor may review them with you.

Now is also a good time to make sure you have an estate plan in place and that your loved ones know where to find it. Want to learn more about estate planning? Check out this helpful article on Thrivent’s website or give us a call.

[The importance of estate planning: Protecting your people, property and privacy](#)



Scan the QR to read the article.

## Abby's adventures

This summer our office professional, Abby, went on an epic trip. Here's her story:

With my best friend and a camera, I embarked on a European adventure spanning 30 days and eight countries.

Our journey kicked off in London, which had nothing but sun in store for us. We filled our days with markets, museums, big clocks and plenty of double decker buses.

Next, we ventured to Paris, to explore iconic landmarks like the Eiffel Tower, the Louvre and the Arch de Triumph. France was challenging because I don't speak French. Ordering food at restaurants was always a bit of a gamble, but I got to try a lot of things I normally wouldn't order.

Next we visited Rome, where we got to see the Colosseum and lots of historic Roman sites. The history was mind-boggling, but what truly stole my heart was the gelato! I didn't know it was possible to eat so much in just a few days.

After Rome, we headed to Venice. Not only were the canals lovely, but the food was amazing. Dining in Venice meant indulging in pasta so delicious I contemplated moving there solely for the cuisine, but I don't speak any Italian, so on to Spain!

When we arrived in Spain, I finally got to flex my language skills. The highlight of the trip was being able to visit the city where I studied abroad in 2022: Toledo, Spain. Not only did I get to walk those historic streets again, but I got to do it with my best friend by my side.

As I reflect on my tour of Europe, one thing is certain: I came, I saw and I ate way too many carbs. But jokes aside, if you're ever wondering where to go for your next vacation, remember: Europe's got history, culture and enough pasta to keep you happy for a lifetime. Bon voyage!



# Cookie corner

## White chocolate cranberry cookies

This is a fun fall cookie Kati recently made for the team. Let us know if you try them.

### Ingredients

$\frac{2}{3}$ cup softened butter	1 tsp. baking soda
$\frac{2}{3}$ cup brown sugar	$\frac{1}{2}$ tsp. salt
2 eggs	1 cup dried cranberries (e.g., Craisins)
$1\frac{1}{2}$ cups old-fashioned oats	$\frac{2}{3}$ cup white chocolate chips, reserving about $\frac{1}{4}$ of them until the end
$1\frac{1}{2}$ cups all-purpose flour	

Note: You can use dark chocolate chips instead of white chocolate for a less sweet, more decadent cookie.

### Instructions

Cream butter and sugar together until light and fluffy. Mix in eggs one at a time. Mix in baking soda, salt and oats. Mix in dried cranberries and most of the chocolate chips. Stir in flour until it is just barely incorporated (this helps keep the cookies soft).

Scoop dough into golf ball sized cookie balls and place them on a baking sheet lined with parchment paper. Flatten each cookie slightly (these cookies do not spread when baking). Gently press a few chocolate chips on top of each cookie right before baking.

Bake at 375 degrees Fahrenheit for 8-10 minutes. Check at seven minutes and rotate if necessary—you know your oven best! Cool on a wire rack, and then share with friends and family.



## Refer a friend

Do you have friends or family who could benefit from our guidance? Send them our way. Thank you for your confidence in our team.

## Stay connected

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