# Clarity Financial Planning Group Connection

**Newsletter** Inaugural issue


## Clarity Financial Planning Group

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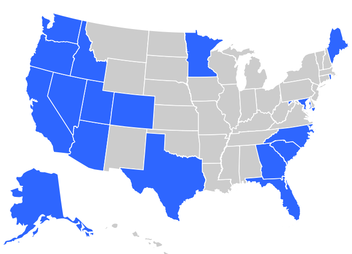
## Stay connected

[Website]
[Email]
[Facebook]



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

| | | |
|---|---|---|
| AK | ID | OR |
| AZ | MD | RI |
| CA | ME | SC |
| CO | MN | TX |
| FL | NC | UT |
| GA | NV | WA |

As of March 2024.

# New name. Same commitment.

We are thrilled to announce several exciting changes.

**New faces**
Please join us in welcoming our newest team members, Sarah Roos and Jake Woodbrey. Sarah is an office professional based in Edmond, Oklahoma and Jake is an associate in Post Falls, Idaho. They've been with us for several months and have already made a significant impact on our team. Adding the right people gives us more capacity to better serve you.

**New focus**
We are committed to delivering a best-in-class virtual client experience and understand it's more about the right people working together than sharing a physical location. Clients choose our team for our expertise and dependability. And by leveraging digital tools, we can serve you, whether you are moving to another state, traveling within the U.S., retiring out of state, or simply looking to save time.

**New homebase**
Some of you may not know that we have an office in Boise, Idaho. Guided by our core value of prioritizing family and relationships, we have decided to close our Vacaville, California, office while ensuring our continued presence and relationships in the area through periodic visits by Financial Consultant Erica Cantrell.

Moving forward, our Boise office will serve as our primary location. This strategic shift allows Erica to be closer to her family. Rest assured, our team is committed to continuing to serve you, regardless of location.

**New name**
While we remain affiliated with Thrivent, we are excited to announce our name has changed from Capitol Corridor Group to Clarity Financial Planning Group. This new name signifies our unwavering dedication to offering clear, insightful financial guidance that empowers you to make informed decisions about your future. And it reflects our commitment to growth without being tied to a specific geographic location.

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**New website**
Stay tuned for our new website launch, where you will find updated information about our team, services and commitment to your financial success.

**What these changes mean for you**
The only visible change you will notice is the Boise office address on your statements. Our phone number and email address will remain the same. We are committed to growing our team, our knowledge and our offerings to serve you and your families.

## Values in action

Erica put our core values of excellence, education and growth into action by completing rigorous, advanced training that enabled her to earn the CERTIFIED FINANCIAL PLANNER™ (CFP®) certification and attain the Chartered Financial Consultant® (ChFC®) designation.


Certified Financial Planner™

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.
HEREBY CERTIFIES THAT

Erica Cantrell

*has met CFP Board's educational, experience, examination, and ethical requirements, and has committed to providing financial planning services that adhere to CFP Board's standards of excellence.*

AWARDED ON August 15, 2023



KEVIN R. KELLER, CAE
CHIEF EXECUTIVE OFFICER

Her dedication to obtaining these designations underscores our team's commitment to growing to better serve you.

How did she celebrate these accomplishments? She embarked on a two-week safari in Kenya, Africa. Most clients didn't even notice she was gone unless they were following her adventures on Facebook. That's the power of having a team to serve you—seamless operations continue even when key members are away.

## Retirement announcement

Our Vacaville office professional, Cindy Pledger, recently stepped into a new role called "retirement"!

Cindy contributed unwavering dedication and a wealth of knowledge to our team. Her commitment to our clients' financial well-being has had a lasting impact, and we are truly grateful for the time she spent with us.

As she embraces this new chapter, Cindy looks forward to gardening, playing with her new puppy, Harley, and spending time with her husband and grandchildren.

## Thrivent recognized as one of the World's Most Ethical Companies

This is the 13th consecutive year Thrivent has been recognized as one of the World's Most Ethical Companies, and this year, we're one of only six honorees in the financial services industry.

To view the full list of this year's honorees, visit **worldsmostethicalcompanies.com/honorees**.

## Our 'Jake' of all trades

Many of you have met Jake Woodbrey, our newest team member from Post Falls, Idaho. We invited Jake to join our team without ever meeting him in person, a decision based on his skill set and experience. He had already been working at Thrivent as a financial advisor, and when we met virtually, we could tell he shared our values and vision, and we knew he was the right fit for our growing team.

In our quest for a best-in-class digital client experience, we have learned that geographical location is no barrier to assembling the right team. Jake's arrival reinforces this belief. He brings a wealth of expertise in team management, a quality we knew would greatly benefit both our clients and our internal operations. But what truly sets Jake apart is his infectious personality. He is not just effective at getting things done, he's a joy to work with.

We affectionately refer to him as our "Jake" of all trades because of his uncanny ability to grasp complex systems and processes. His passion for leveraging cutting-edge technology to enhance user experiences is evident from his work with the largest global online university, where he crafted virtual experiences that rivaled in-person interactions.

Jake truly embodies the spirit of innovation and collaboration that defines our team, and we are blessed to have him on board. To learn more, check out his bio on our **website**.

Erica and Paul meeting Jake for the first time at Thrivent's 2024 Business Development Conference in Dallas, Texas.

# A unique business model

As a not-for-profit Fortune 500 company, we provide holistic financial services and help clients live lives full of generosity and abundance. Who else can say that?

We are thrilled to share what generosity looks like at Clarity Financial Planning Group. Together, we've made a significant impact in our local communities.

### Financial impact

$3,533,460

Thrivent Choice Dollars® directed, online personal donations, Thrivent Action Team funds raised, Charitable and Thrivent Community event funds raised, Thrivent Charitable grants, Thrivent Action Team seed funds, and total value of volunteer hours

### Client and community impact

457

Thrivent Action Teams

323

Thrivent Choice® participants

6,279

Thrivent Action Team leaders and volunteers

84,728

Thrivent Action Team, Charitable and Thrivent Community event volunteer hours

### Event impact

6,718

Financial, charitable and Thrivent community event participants

# Upcoming events

## Keeping the Tax Man Away with Debbie Taylor

**June 4 | Virtual livestream event**

If taxes are a topic you avoid, this event is for you. It's common to think you'll pay less taxes in retirement because you're earning less, but that's not necessarily true without planning.

Email our team for details on how to RSVP.

## Thrivent Market & Economic Update

**July 30 | 9:30 a.m. PT | Virtual webinar**

Wondering how to navigate current market conditions? Join us on July 30 for our Market & Economic Update. Our investment leaders will share their insights and guidance to help you navigate the markets in today's economy. Don't miss this opportunity to learn what the latest economic trends could mean for you.

Email our team for details on how to RSVP.

## Mark your calendar

**May 12**
Mother's Day

**May 27**
Memorial Day, offices closed

**June 1**
National Say Something Nice Day

**June 16**
Father's Day

**June 19**
Juneteenth

**July 4**
Independence Day, offices closed

# Your referrals are our biggest compliment

Do you have friends or family who could benefit from greater financial clarity? Please don't keep us a secret. We'd be happy to meet them and explore how we can help them develop a clear path forward.

Website | Email | Facebook

Advice | Investments | Insurance | Banking | Generosity