

Third Coast News

Fall 2024



Your goals,
our strategy.
Together, building
lasting legacies.

Third Coast Wealth Advisors' mission is to serve our clients by providing sound, ethical advice, enabling them to achieve their financial goals and impact future generations and communities.

thrivent.com/thirdcoast

Sheboygan Office

2808 Kohler Memorial Dr., Ste. A
Sheboygan, WI 53081
920-451-1775

Green Bay Office

2700 Vernon Dr.
Green Bay, WI 54304
920-393-1330

Sturgeon Bay Office

160 S. Madison Ave.
Sturgeon Bay, WI 54235
920-743-9143

Oostburg Office

927 Center Ave., Ste. 1
Oostburg, WI 53070
920-451-1775



Scan to visit
our website

Greetings!

What a wonderful summer it has been here on the Third Coast! And so far, it seems like the warmer temperatures want to stick around a bit longer. School is back in session and fall sports are in full swing. That is definitely true in our house where Cate started her first year of middle school, Jack is in third grade and our sweet Caroline in junior kindergarten. If they aren't at school, they are doing their favorite activities including figure skating, theatre, soccer and football. After 19 years of teaching in the Sheboygan School District, my wife, Holly, decided to make a change and teach third grade in Kohler. It's a blessing for our family to have her and our three kids in the same school.

Speaking of kids, our community really showed up big for our annual fundraising campaign for Children's Hospital of Wisconsin. We raised more than \$25,000 to help their mission, ensuring we can have the healthiest kids possible. Thank you to all of you who donated and shared stories on a child's journey at Children's. The stories shared and the connections are truly the most inspiring part.

Living Generously is something we feel passionately about, and in spring I was asked to participate in the "Men Who Cook" event benefitting Safe Harbor. For those not familiar, it is an organization based in Sheboygan that supports victims of domestic violence and abuse. About 15 of us amateur chefs prepared our

own recipes and served more than 250 participants. Fortunately, I had the help of my talented sous chef, Eric Grasse. It was a successful event that also brought forward the important mission and role Safe Harbor plays here on the Third Coast. Inspired by their work, we have chosen them as our featured organization for Giving Tuesday. You can read more about Safe Harbor and their local mission in our Giving Tuesday article.

Here in the office, we have been busy. Our financial advisors have enjoyed engaging in our holistic financial planning with so many new and current clients. We have been so fortunate to add Associate Zach Slayton to our team supporting our brokerage operations. Additionally, we recently engaged with 3Fourteen Research to better support our brokerage and research operations. Both show our commitment to offering high-quality advice and service to our clients.

From a macroeconomic perspective, we have just seen interest rates drop and Election Day is fast approaching. And don't forget—tax season is right around the corner. Please don't hesitate to reach out to your financial advisor should you have any questions at all. We are here to help.

Thank you for your trust and confidence and we look forward to seeing you soon.

Blessings,
Jonathan Risseeuw
Financial Associate

Navigating financial waters

Our friend and colleague, Austen Wilson, financial advisor of Ascend National Wealth Advisors wrote a great article “Navigating Financial Waters in an Election Year.” We would like to share an excerpt of that article as we approach the 2024 election.

“Many of you have asked how the political landscape might affect your finances. While elections can create uncertainty, I want to offer some guidance to help you stay focused on your long-term goals. Remember, markets have historically shown resilience regardless of which party is in power.

Key areas to watch:

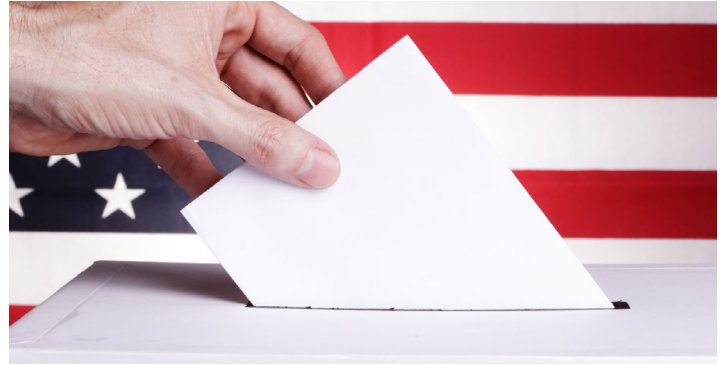
Tax planning: Stay informed about proposed changes, but avoid hasty decisions based on campaign promises.

Sector impact: Different administrations may focus on specific industries. We’ll be watching closely to identify potential opportunities or risks in your portfolio, always with an eye on maintaining proper diversification.

Retirement accounts: We’ll adjust strategies if there are changes to contribution limits or tax treatments.

Healthcare costs: Healthcare is often a hot-button issue during elections. We’ll continue to factor potential healthcare policy changes into your long-term financial plan.

Estate planning: We’ll work with your attorney to keep your plan robust amid possible changes.



Remember, our investment philosophy is grounded in biblical principles of stewardship and long-term thinking. Just as we’re called to be “steadfast, immovable” (1 Corinthians 15:58), we advocate for a steady approach to your finances, especially during times of political change.

While it’s natural to feel concern about potential policy shifts, it’s important not to let short-term political noise derail your long-term financial strategy. Our team is committed to helping you navigate these waters with wisdom and discernment.

As always, we’re here to discuss any concerns you may have. Let’s use this time as an opportunity to review your financial plan and ensure it aligns with your values and goals, regardless of the election outcome.

Stay focused, stay faithful and remember—we’re in this journey together.”

Thank you, Austen, for the encouragement to keep focused on the long-term.

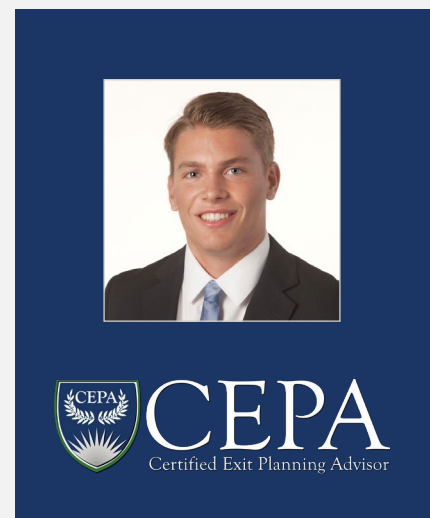
Congratulations Brayden!

Third Coast Wealth Advisors is proud to announce that Brayden Van Ess recently earned the Certified Exit Planning Advisor (CEPA) credentials after completing the Institute’s intensive five-day executive MBA-style program. Brayden joins an elite group of business advisors who have received this credential and are part of the Exit Planning Institute’s international community of CEPAs.

The CEPA program is the most widely accepted and endorsed professional exit planning program in the world.

Professional advisors that hold this credential want to effectively engage business owners and help them build more valuable companies, have stronger financial plans, and align their business and personal goals.

Congratulations Brayden!



Giving Tuesday: Safe Harbor



Safe Harbor is dedicated to providing prevention education, crisis intervention, emergency shelter and transitional stabilization services to empower community members to live lives free of violence. It is our goal to create a community where all members have the ability to live free of interpersonal violence in their lives. "We Are We, Not Just Me." This value is about humility and solving for others' needs, not just one's own. It's about taking responsibility, sharing in success and recognizing that together, we are better. Safe Harbor relies on support from the community to provide services through our life-changing programs.

Your financial support helps us continue to provide support to those impacted most by domestic violence, sexual assault and human trafficking. We strive to create a safe and equitable community for everyone.

Here are three ways you can help today:

- Make a donation which will be matched by Thrivent, \$1 for every \$2 collected, up to \$3,000, through [this giving hub](#).*
- Shop Amazon using their [wish list](#) and have items sent directly to Safe Harbor.
- Purchase items from the list to the right at the store of your choice and bring donations to our office at 2808 Kohler Memorial Drive from December 2 to 5, 8 a.m.–4 p.m.

*Thrivent will provide a \$1 match for every \$2 donated through this online campaign up to a maximum match of \$3,000. Thrivent will pay up to \$300,000 in online processing fees per calendar year for personal donations made through Thrivent's online giving platform.

Safe Harbor donation items

All items must be new.

Lowering barriers and increasing safety

- Security doorbells, window alarms, flood lights or home monitoring kits
- Transportation gift cards (bus, Uber, Lyft, gas)
- Grocery gift cards for purchase of food for shelter and groups
- Book diversion safe
- Plant diversion safe

Basic needs/household items

- Deodorant
- Textured hair products
- Body wash/lotion
- Hand soap
- Cleaning supplies
- Paper towels
- Laundry detergent
- Dish detergent
- Dishwasher detergent
- Sponges

Shelter

- Sound machines
- Laundry baskets
- Storage totes
- Baby monitors
- Silverware
- Kitchen utensils
- Plastic plates and glasses
- Mugs
- Bedside fans
- Bath towels
- Plastic/cling wrap
- Aluminum foil

Will you share the gift of financial confidence?

Our team has assisted you with some of the biggest decisions that you'll ever make, all while remaining focused on what truly matters. In the process of helping you achieve your goals, we've facilitated many gifts to charities, churches and other funds that matter to you. We've also partnered with local nonprofit organizations to build relationships and programs that make a difference. We'd love to help your family and friends do the same.

By referring, you are giving the gift of financial confidence to those you care about.



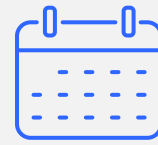
Live Your Best Life 2024



Thank you for your generous support of Children's Wisconsin. We are excited to share that Live Your Best Life 2024 raised more than \$25,000! This helps make an impact on the lives of kids in our community, today and tomorrow.

This year we gathered at BOLD Cycle for a great ride and had a fun day of golf at The Baths of Blackwolf Run. The weather was perfect for each event, and we are already planning Live Your Best Life 2025.

Thank you, BOLD Cycle, Destination Kohler, Van Horn Automotive, Larry's Distributing, Lakeside Pepsi, Be The Difference NIL, VC Connect, Pine River Dairy, Oostburg Concrete, Signature Dental, Richco Structures, Rockline Industries, Meinhardt Orthodontics, t.a.t. Photography, Shayna Jewelry, and all donors for making the events a success.



Important dates

November 19

Thrivent's Market & Economic Update

November 28 and 29

Thanksgiving
(offices closed)

November 30, 5 p.m.

Oostburg Christmas Parade (Third Coast serving pumpkin pie in a cup)

November 30, 6:30 p.m.

Making Spirits Bright
(Third Coast volunteering)

December 3

Giving Tuesday
(benefitting Safe Harbor)

December 10

2024 transaction deadline

December 10–25

Virtual Christmas Concert featuring five-time Grammy® Award-winning artist, Steven Curtis Chapman

December 24

Christmas Eve
(office closes at noon)

December 25

Merry Christmas
(offices closed)

January 1

Happy New Year
(offices closed)



View our team video

[Visit our website](#) to check out our team video.

Stay connected

Check our team website, Instagram and Facebook for the latest news and upcoming events.

Website: thrivent.com/thirdcoast

Instagram: [@third_coast.thrivent](https://www.instagram.com/third_coast.thrivent)

Facebook: [facebook.com/thirdcoastwealthadvisors.thrivent](https://www.facebook.com/thirdcoastwealthadvisors.thrivent)

Email: thirdcoastwealthadvisors@thrivent.com

Thrivent and its financial advisors and professionals do not provide legal, accounting or tax advice. Consult your attorney or tax professional.

Thrivent provides advice and guidance through its Financial Planning Framework that generally includes a review and analysis of a client's financial situation. A client may choose to further their planning engagement with Thrivent through its Dedicated Planning Services (an investment advisory service) that results in written recommendations for a fee.

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](https://thrivent.com/disclosures).

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