

Mississippi Valley Associates Connections

Mississippi Valley Associates

Cedar Rapids Office

3349 Southgate Ct. S.W.
Ste. 101
Cedar Rapids, IA 52404

P: 319-366-2991

F: 319-366-2891

Mon.–Fri., 9 a.m.–4 p.m.
and by appointment

DeWitt Office

908 Sixth Ave.
DeWitt, IA 52742

P: 563-659-2991

F: 563-659-2891

Mon.–Fri., 8:30 a.m.–4:30 p.m.
and by appointment

Geneseo Office

209 W. Exchange St.
Geneseo, IL 61254

P: 309-944-4538

Mon.–Fri., 9 a.m.–5 p.m.
and by appointment

Johnston Office

5404 N.W. 88th St.
Johnston, IA 50131

P: 515-494-3477

Mon.–Fri., 9 a.m.–5 p.m.
and by appointment



Inquiring minds want to know

Have you ever played 20 questions? One person thinks of a secret person, place or thing. The rest of the players take turns trying to guess the secret by asking a total of no more than 20 questions. Asking and answering questions can be plain old fun, and it can also be a powerful, meaningful way to connect and build understanding.

Recently, we polled our team to learn what questions our clients often ask. Here are some of the results:

Budgeting

- How much should I have in my emergency savings?
- Which debts should we pay off first?
- When should we start investing and what are our options?

Insurance

- How much coverage would be right for us?
- How do I afford medical insurance in retirement?

Investing

- Should I make changes to my investments so they are more or less risky?
- Are there ways to be more tax-efficient with my investments?

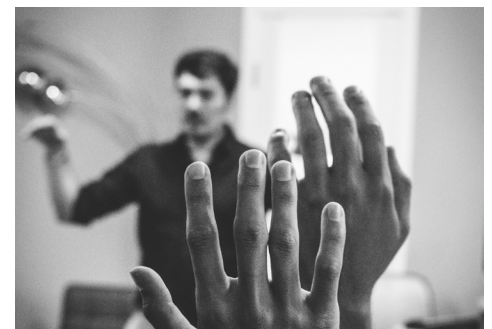
Retirement

- What can I do with my old 401(k)?
- How much do I need to save to retire or retire early?
- Am I on track for retirement?
- When should I take Social Security?

General

- Is the personal and financial information I share with you confidential and secure?
- How much does it cost to work with a financial advisor?
- Who will help me if my financial advisor leaves or retires?

What questions do you have about your unique financial journey? Our team at Mississippi Valley Associates welcomes all of them, even if there are more than 20!



Meet the team



Alex Carr
MBA, FIC
Financial Advisor
Cedar Rapids office



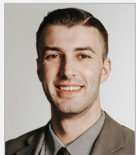
Gaylon Heetland
CFP®, ChFC®, CLU®,
CAP®, CASL®, LUTCF®,
FIC, CKA®, BFA™
Associate
DeWitt and Cedar Rapids offices



Casey Walker
CLU®, LUTCF®, FIC
Financial Consultant
DeWitt office



Maurie Nelson
LUTCF®, FIC
Associate
Geneseo office



Dillon McBee
Associate
Johnston office



Tom Emerson
Associate
Cedar Rapids office,
serving the greater
Dubuque area



David King
Practice Support
Associate
Cedar Rapids office



Allison Thede Everman
Office Professional
Cedar Rapids office



Kallie Barnhart
Office Professional
DeWitt office



Teri Burkett
Insurance Office
Professional
Cedar Rapids office

Kathy Drury
Office Professional
DeWitt office

Jo Anne Renfro
Office Professional
Remote



This interview with Associate Gaylon Heetland reveals the connection between his faith and his career in financial services and explains why he became involved with Kingdom Advisors.

What is Kingdom Advisors?

“Kingdom Advisors is an organization that provides tools and training for the integration of financial advisors’ faith and their financial practice. Certification can be obtained by completing online training modules, case studies and testing. Continuing education and a yearly conference are also offered.”

What impact has the Certified Kingdom Advisor® designation had on your career?

“It keeps my job in perspective. It’s not about money. It’s about Christian stewardship.”

What impact does your designation have on clients?

“For one thing, it has helped me integrate financial advice and biblically wise counsel for clients. This enables us to better match their Christian values with their investment strategies so they can make an impact in the way they want to.”

In 2021, you and another Thrivent financial advisor began leading a monthly Kingdom Advisors study group. What impact has this had?

“It’s terrific to share this Bible study with others in the broader church work community. Our group includes not only financial advisors, but also a planned giving professional and a director of business and finance.”



Does market volatility keep you awake at night?

[Thrivent.com](https://www.thrivent.com) has many resources to help you navigate your financial journey with clarity and confidence. One helpful article is “Bull vs. bear market: What’s the difference?” It explains market conditions and offers tips about investing during volatile times. Check it out at [thrivent.com/insights/investing/what-is-a-bull-vs-bear-market](https://www.thrivent.com/insights/investing/what-is-a-bull-vs-bear-market).

Upcoming events



Catch the Friday Morning Brew

Friday, October 25 and Friday, November 22 | 7–9 a.m.

3349 Southgate Ct. S.W., Ste. 101

Stop by our Cedar Rapids office for coffee and donuts. Caffeine and carbs are a great way to kick off your Friday!



Business Owner Workshop

Tuesday, November 12 | 8–9 a.m.

The Hotel at Kirkwood Center, 7725 Kirkwood Blvd. S.W., Cedar Rapids, IA

Business owners are invited to join us for an educational workshop with Thrivent Financial Advisor Ryan Gerardy, CFP®, CEPA, and special guest Thrivent Regional Business Development

Consultant Eric Murphy, CEPA.

We will dive into how we partner with business owners to complement their business, personal, and financial goals. We'll share actionable strategies to help you align various aspects of your life and guide you toward success.

In addition, we'll explore how to identify, protect and enhance your personal and business future. You'll learn how to:

- Identify your wealth goal, wealth gap and business value.
- Protect what you've built and retain top talent.
- Incorporate tax-efficient solutions.

You're welcome to RSVP in advance or walk in. Simply call 319-366-2991 or email teresa.burkett@thrivent.com.



An opportunity to give back

Items may be dropped off at:

Mississippi Valley Associates, 908 Sixth Ave., DeWitt

The Mississippi Valley Associates Thrivent Community will be hosting a food and paper product drive in December for DeWitt Referral Center Christmas boxes. Stay tuned for more details.



Christmas open house

Monday, December 9 | 5–7 p.m.

Mississippi Valley Associates, 3349 Southgate Ct. S.W., Ste. 101, Cedar Rapids

Join us for holiday treats, cheer and activities for all ages.



Giving thanks

“Now to him who is able to do immeasurably more than all we ask or imagine, according to his power that is at work within us, to him be glory in the church and in Christ Jesus throughout all generations, for ever and ever! Amen.”

—Ephesians 3:20-21 ESV

Recipe corner

Rose’s lemon orzo soup

My wife, Rose, and I had this soup at a church Advent meal and tracked down who made it. It’s a favorite for my lunches. Rose usually makes a large batch and freezes it in smaller containers for me to warm up. Everyone in the office is jealous when they smell Rose’s homemade soups!

—Gaylon Heetland, Associate



Preparation and cooking time: five hours

Serves nine people.

Ingredients

- | | |
|---|--|
| 9 cups chicken broth | 2½ teaspoons kosher salt |
| 4 cups shredded cooked chicken (rotisserie) | 8 ounces uncooked orzo pasta |
| ¾ cup chopped sweet onion (1 small) | ¾ cup frozen peas, thawed |
| ¾ cup thinly-sliced, peeled carrots (2 large) | ¼ cup chopped fresh, flat-leaf parsley |
| ½ cup thinly-sliced celery (3 stalks) | 1 tablespoon fresh lemon zest |
| ½ cup dry white wine | ¼ cup fresh lemon juice |

Instructions

1. Combine broth, chicken, onion, carrots, celery, wine and salt in a six-quart slow cooker.
2. Cover and cook on low until vegetables are tender (for about four hours).
3. Increase heat to high and stir in orzo.
4. Cover and cook until orzo is tender (for about 15 minutes).
5. Stir in peas, parsley, lemon zest and lemon juice.
6. Serve when heated through.

Refer a friend

Do you have friends or family who could benefit from our guidance? We’d be happy to meet with them to learn about their needs and explore how we can help.

Stay connected

W connect.thrivent.com/mississippi-valley-associates

f facebook.com/MississippiValleyAssociates

No products will be sold at these events.

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Not all team members may office at the above addresses.

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