Partnership Opportunities

Each planning partnership includes customized financial planning software to facilitate an assessment of probability, progress reports designed to keep you on the right path, and written advice summary letters that include observations, recommendations, and action items.
Choose the partnership level that fits you:

Be INTENTIONAL

$1,200/yr

A financial planning experience to help you begin your journey or maintain an existing financial plan.

Partnership Includes

- Assess **Probability** of Success
- Develop Cash Flow **Process** (money in/money out)
- Explore **Possibilities** (1-2 annually)
  - ❑ Asset Allocation
  - ❑ Insurance Review
  - ❑ Group Benefits
  - ❑ Debt Payoff/Cash Flow
  - ❑ College Savings
  - ❑ Tax-Efficiency
  - ❑ Charitable Giving

Partnership Frequency

- Typically 2 meetings annually
- Certified Financial Planner (CFP) to advise you, plus planning coordinator and service coordinator to support and guide you along the way
- Opportunities for a social, charitable, or informational experience each year

Be INNOVATIVE

$2,400/yr

A customized planning experience to help you develop, coordinate, and maintain a more complex plan.

Partnership Includes

- **Probability, Process,** and, Explore **Possibilities** included in Intentional partnership (2-3 annually) plus advice and guidance on the following:
- Coordination of tax and legal aspects with your professional partners
- Charitable giving strategies and coordination with gift planners
- Detailed distribution strategies and advanced tracking of complex net worth

Partnership Frequency

- Typically 2-3 meetings annually
- Certified Financial Planner (CFP) to advise you, plus planning coordinator and service coordinator to support and guide you along the way
- Multiple social, charitable and informational experiences throughout the year

Be VISIONARY

$3,600+ /yr

A coaching and planning experience that requires a sophisticated level of advice, service, and coordination of a complex plan.

Partnership Includes

- **All services** included in **Intentional** and **Innovative** level partnerships plus advice and guidance on the following:
- Complex Net Worth
- Detailed cash flow
- Real Estate holdings
- Coordination of estate planning
- Business Planning
- Stock Options
- Envision a bigger future of generosity & generational planning

Partnership Frequency

- Typically 3-4 meetings annually
- Certified Financial Planner (CFP) assigned to you and planning coordinator to support and guide you along the way
- Exclusive social, charitable, informational experiences to help you plan intentionally and live generously

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Important Information

An independent practice of Thrivent Financial.

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

Thrivent Financial and its respective associates and employees have general knowledge of the Social Security tenets; however, they do not have the professional expertise for a complete discussion of the details of your specific situation. For additional information, contact your local Social Security Administration office.

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. Advisory services available through investment adviser representatives only. Thrivent.com/disclosures.

The financial planning service is an investment advisory service and is designed for you and a Thrivent Financial professional to periodically review your personal financial position holistically and to plan strategies tailored to help you reach your financial goals. Significant changes to your financial situation or objectives may necessitate changes to charges and fees. Please review the Thrivent Financial Planning Service ADV Disclosure Brochure, Service Agreement, and/or the Thrivent Managed Accounts Disclosure Brochure, and/or Thrivent product brochures for a full description of services offered, including fees, commissions, and expenses.

Thrivent Financial Planning Service, solution-based service, and managed account investment services are three distinct services available to investors. Your financial planning fee will vary based on your personal financial situation, your Thrivent Financial representative's practice fee schedule, and other factors including:

- The scope of the service you will receive.
- The complexity of your financial situation and related analysis.
- Your financial professional's and team's time involved working on your financial situation.
- The experience level and credentials of your financial professional.

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