INTENTGEN
FINANCIAL PARTNERS

HOW MUCH IS ENOUGH?

AM I EFFICIENT WITH TAXES?

HOW MUCH STOCK EXPOSURE SHOULD I HAVE?

Schedule your free, no-obligation second-opinion consultation to review your goals, share concepts, and explore next steps with you. Contact Candy Egan (630-821-6990 ext. 107 or candy.egan@thrivent.com).

- Review risk tolerance and investment allocation efficiencies through **AssetMatch®, IncomeMatch® and Morningstar Portfolio X-Ray®**
- Understand the impact of marginal tax brackets through **What-if Tax®**
- Review your assets through the lens of a **Tax-Efficiency Checklist®**

As Certified Financial Planner™ professionals, we are strong believers that you deserve to understand all your options. At IntentGen Financial Partners, our role is to educate and advise you so that you feel confident in your financial strategies and plans. We invite you to engage us in a Second Opinion Process to experience the impact it could have on your financial future.

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