



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@intentgen.com).

- Review risk tolerance and investment allocation efficiencies through **Morningstar Portfolio X-Ray®**
- Understand the impact of marginal tax brackets through our tax software
- 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.

IntentGen Financial Partners
Wealth Advisors

Zachary Larson, CFP®, Corey Schmidt, CFP® and Jacob Schatz, CFP®
630-821-6990 • www.intentgen.com
1460 Bond St., Ste. 120 • Naperville, IL 60563

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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

Advisory Persons of Thrivent provide advisory services under a practice name or "doing business as" name or may have their own legal business entities. However, advisory services are engaged exclusively through Thrivent Advisor Network, LLC, a registered investment adviser. IntentGen Financial Partners and Thrivent Advisor Network, LLC are not affiliated companies. Information in this message is for the intended recipient[s] only. Please visit our website www.intentgen.com for important disclosures. Securities offered through Purshe Kaplan Sterling Investments ("PKS"), Member FINRA/SIPC. PKS is headquartered at 80 State Street, Albany, NY 12207. PKS and IntentGen Financial Partners are not affiliated companies.