IntentGen Financial Partners & Thrivent Advisor Network FAQ

IntentGen Financial Partners is a financial firm founded by Wealth Advisors Corey Schmidt and Zac Larson. As Certified Financial Planners™ who have worked with Thrivent for over 40 combined years, we have built a firm that works for you and with Thrivent (and other financial companies). We exist to help you plan intentionally and live generously. Check us out at www.intentgen.com.

We're excited to announce our decision to become an independent practice and join the Thrivent Advisor Network (TAN). This is the next step in a transition process we've been working on for the last two years. And that's great news for you! With this change, we'll be even better equipped to partner with you for your financial future as we utilize new technology, investment platforms, and even more solutions and services. We know you'll have questions … here are responses to some of the first questions we've heard:

1. Why are we changing?	• To continue building a firm that can provide comprehensive financial advice, solutions, and services to our clients.
2. Does Thrivent know about this?	• Yes. We are making this transition with support from Thrivent and in affiliation with the Thrivent Advisor Network.
3. Will I still have the same membership privileges of Thrivent?	• Yes. Your Thrivent products won't change; they still give you access to the same benefits, such as Thrivent Choice® or Thrivent Action Teams.
4. Will my financial statements still look the same?	• No. Although products stay the same, the brokerage firm and custodian will change if you move with us. New technology platforms will change the look of statements and improve access to a comprehensive view of your finances.
5. Do I have to change?	• It's your choice. If you desire a more comprehensive financial planning partnership, we invite you to join us in the transition. If you desire things to stay the same, you may be best served by a local Thrivent financial professional.
6. How do I know what's best for me?	• Schedule a time to meet or talk with an Advisor from our team. This allows you to learn more and allows us a chance to hear about your goals and priorities so we can share how we might partner with you.

7. What is TAN and are we still a part of Thrivent?	• Yes, we are still a part of Thrivent. TAN (Thrivent Advisor Network) is a registered investment adviser (RIA) that offers investment management and advisory services through a network of investment advisory representatives. It builds on the century-old heritage of Thrivent, a Fortune 500 company that has helped millions of people achieve financial clarity and live lives full of meaning and gratitude. With TAN, we have access to a broader community of values-based advisors and new investment solutions and technology.
8. What are the differences between TAN and Thrivent?	• The key difference between TAN and Thrivent is our ability to operate independently and offer additional investment solutions and access to new technology. We have purposely chosen to say within the Thrivent family because we take pride in ensuring that our shared values are at the core of our business practices.
9. How big is the network?	• By the end of 2020, we expect there to be about 25 distinct practices on the TAN platform.
10. Will my team stay the same?	• Yes, our entire team will be transitioning, and will remain the same. You will continue to receive support from the team you have come to depend on for a sense of reassurance and financial clarity.
11. How long is the transition period? Why now?	• The transition period lasts approximately 10-12 weeks and will be completed in September 2020. This journey has been in motion since 2018 and we look forward to taking this final step in the journey this summer. • As a firm, we have had the desire to grow and expand for some time. Our focus was on finding a fit for our team that would allow us to continue to operate with the same values and focus on improving the lives of our clients. This will give us greater independence, as well as access to additional products, investment solutions and technology platforms.
12. Will your contact information change?	• Our office address and phone numbers will be the same. As part of our transition to the Thrivent Advisor Network, each member of our team will have a new email address that will be communicated closer to our official launch date (September 2020). There will be a period of time where our current email addresses remain active after our launch date to be sure we don't miss a message from you.

13. Will the technology we've been using change?

- Some of the technology that we use will stay the same and some will change. Through the TAN platform, we will have access to industry-leading technology including Black Diamond, MoneyGuidePro, Morningstar, Fidelity, and others.

System	Current	TAN
Clearing & Custody	National Financial Services, LLC (owned by Fidelity)	Fidelity
Portfolio Management, Client Performance Reporting, and Online Client Portal	Envestnet	Black Diamond
Financial Planning	MoneyGuidePro	MoneyGuidePro
Account Aggregation	Yodlee	Yodlee
Compliance	Thrivent	Thrivent Advisor Network & Advisor Assist

14. Will I have to learn new processes or systems?

- Yes. There will be a transition to new systems as we move to the industry-leading technologies and platforms provided by TAN. All of these platforms are intuitive and user-friendly. We will be here to guide you through the process for a smooth experience.
- You will no longer access your brokerage accounts through thrivent.com. You'll create new login credentials through the new client portal accessed on our website (details forthcoming).
- There will be a mobile app which you can download for an enhanced digital experience with your financial plan and investments.

15. Will the investment offerings be the same?

- All of the options available to us today remain available in TAN along with an expanded offering that we will review with you when appropriate for your plan. Investment offerings are available through Fidelity and PKS.

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