

News with a Purpose

Second quarter

June 2024

Our team



At Purpose Driven Wealth, we act as responsible stewards for our clients by providing thoughtful advice and using our wealth management approach to help you achieve confidence, clarity and contentment. Our process includes understanding your current situation, discovering your goals, designing a plan, delivering solutions and sustaining progress.

thrivent.com/pdw

Windsor office

355 Eastman Park Dr., Ste. 201
Windsor, CO 80550
970-330-7411

Office hours: 9 a.m. to 4 p.m.

Cheyenne office

401 W. 19th St., Ste 304
Cheyenne, WY 82001
307-778-3076

Office hours: By appointment only

Team member spotlight: Lotem Sella, Director of Investment Operations

Lotem was born in Israel and immigrated to California when he was four years old before coming to Colorado in his teens. In high school, he worked as a golf caddie, which allowed him to become an Evans Scholar and graduate from the University of Colorado with film and finance degrees. He serves as an extension of our team providing expertise in investment services.

Lotem is responsible for investment research, brokerage operations and reporting, along with all investment-related client communications. He also manages relationships with third-party investment and research firms, monitors client accounts, and creates tactical trading strategies. In his free time, Lotem enjoys reading about the economy, hiking, golfing, and being overly critical about any new film he watches.



Book recommendation?

How Not to Die by Dr. Michael Greger

Favorite outdoor activity? Hiking

Favorite snack? BBQ potato chips

Most recent travel spot? Bahamas

If you had to eat one meal every day for the rest of your life, what would it be? Chicken piccata

Quarter 1 business planning

In March, we completed our first quarter business planning session. Our team learned each other's communication styles to be more efficient with our professional conversations, as well as how we can improve our internal processes. We followed our internal meeting day with a morning at Serve 6.8. We organized their food pantry and went through donated clothes, then ended the day axe throwing as a team!



Meet the team



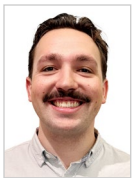
Clint Jasperson
Wealth Advisor



Alyssa Davis
Associate



Daniel (Danny) Sonnenberg
Office Professional



Jesse Doke
Insurance Support Associate



Peyton Thomas
Insurance Support Associate



Lotem Sella
Director of Investment Operations



Joseph (Joe) Dobson
Investment Analyst



Lindsay Kimbrell
Operations Manager

Register for online account access



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Purpose Driven Wealth's 2023 impact*

This is Purpose Driven Wealth's client impact of volunteer hours and funds raised through Thrivent Action Teams and Thrivent Choice programs in 2023. Our clients have made a huge impact in our community, and we are excited to see what impact we can have in 2024!

Client and community impact

153
Thrivent Action Teams.

455
Thrivent Choice® participants.

6,196
Thrivent Action Team, Charitable and Thrivent Community event volunteer hours.

1,022
Thrivent Action Team leaders and volunteers.

Event impact

219
Financial, charitable and Thrivent community event participants.

*From January 2023 to November 2023.

Fun recommendations from the team

Cheyenne, Wyoming recommendations (Clint)



Cheyenne Frontier Days: July 19-28

Cheyenne Frontier Days has always been enjoyable for me. I love going with family and friends to the rodeos and concerts in the evening. They don't call it the Daddy of 'em All for nothing! There are activities for all ages, which help keep everyone entertained.



Curt Gowdy State Park

Curt Gowdy State Park is a beautiful state park in Wyoming. It offers hiking, camping, fishing and an amphitheater for concerts and cultural activities. One can view low-lying meadows, rolling hills and granite formations. It's also full of wildlife and a variety of non-native birds.



Cheyenne Street Railway Trolley

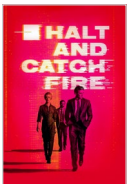
The Cheyenne Street Railway Trolley is a great family experience to learn the rich history of Cheyenne. One can learn about the city's most interesting sites and historic buildings while listening to stories from the trolley driver.

TV show recommendations (Lotem)



"The Sopranos"

While they're far from perfect, America's favorite crime family brings a sense of nostalgic comfort to my eyes.



"Halt and Catch Fire"

Great show about the 1990s tech scene in Silicon Valley. The story isn't spectacular, but the characters are fantastic.



"Shogun"

The first few episodes were great and then things slowed down. Still a fun watch if you like historical time pieces and this one is unique because it takes place in medieval Japan.



Important dates

May 31–September 6 PDW summer hours

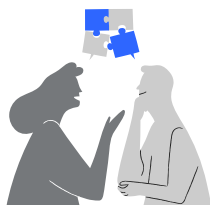
We are changing our Friday hours to 9 a.m.–2 p.m. so our team can enjoy summer!

June 27–June 28 PDW business planning event

Our office hours will vary during these dates. We will not be available in-person, but please leave a voicemail or email us, and we will get back to you as soon as we can.

Thursday, July 4 Independence Day (office closed)

Friday, July 5 Joe's Birthday



Do you have friends or colleagues who you know would benefit from working with our team? We would love to connect with them!

Peyton's gluten-free peanut butter chocolate chip cookie recipe

Peyton enjoys trying new recipes and this one has been a favorite with her friends and family. The recipe is flourless, so it's a great addition to bring to a party for anyone who has gluten allergies.

Ingredients

- 1 cup natural peanut butter
- 1 cup sugar
- 1 teaspoon pure vanilla extract
- 1 large egg, lightly beaten
- ½ cup chocolate chips

Directions

Preheat the oven to 350 degrees and place the racks in the upper and lower third of the oven.

In a medium bowl, mix the peanut butter, sugar, vanilla, egg and chocolate chips until well combined. Spoon one tablespoon of the mixture about one inch apart onto ungreased baking sheets.

Bake until golden around the edges, about 10 minutes, switching the position of the sheets halfway through baking. Transfer to racks to cool. Repeat with the remaining dough.



Stay connected

Check our team website, Instagram and Facebook pages for the latest news and upcoming events.

Website: thrivent.com/pdw

Instagram: [instagram.com/purposedrivenwealth.thrivent](https://www.instagram.com/purposedrivenwealth.thrivent)

Facebook: [facebook.com/Purpose.Driven.Wealth.Thrivent](https://www.facebook.com/Purpose.Driven.Wealth.Thrivent)

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