Your Journey Financial Advisors

Faithful guides on your financial journey

At Your Journey Financial Advisors, we are passionate about forging deep relationships with our clients. We are knowledgeable professionals who take a caring and holistic approach to helping you reach your financial goals.

Our mission is to help you and your family plan for today's needs and tomorrow's opportunities.

By connecting your values with what is most important to you, we provide thoughtful advice and focused planning to help you achieve confidence, clarity and contentment for generations to come.

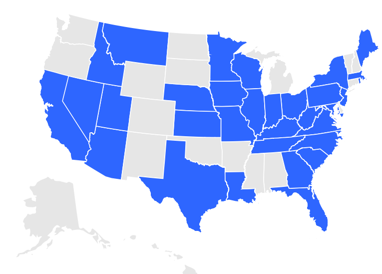
Let's connect

thrivent.com/yourjourney

Charlotte office
4530 Park Rd., Ste. 109
Charlotte, NC 28209
P 704-525-2657

Claremont office
3238 W. Main St.
Claremont, NC 28610
P 828-459-0076
F 828-459-0732

Hickory office
910 Tate Blvd. S.E., Ste. 105
Hickory, NC 28602
P 828-855-9690
F 828-855-9691



Our team serves clients nationally and is licensed in:

AZ	KS	MT	RI
CA	KY	NC	SC
FL	LA	NE	TN
GA	MA	NJ	TX
IA	ME	NV	UT
ID	MD	NY	VA
IL	MN	OH	WI
IN	MO	PA	WV

As of June 2024.

How we work with you

Our approach goes beyond any one topic. Whether you're seeking guidance on managing wealth you've accumulated or have several financial goals in mind, our advice integrates your objectives into a personalized blueprint that grows and changes with your needs and goals. We develop customized solutions across these key areas:

- Wealth accumulation
- Protection planning
- Retirement income distribution
- Tax planning
- Legacy planning

Pursuing your financial goals, together

When you work with us, your goals are at the center of the experience. By getting to know your complete financial picture, we can see where you are now and what steps are needed to get you where you want to be. You can expect a collaborative process as we:

Understand
Where you are today and where you want to be tomorrow.

Strategize
Based on your unique situation.

Implement
Ideas aligned with your goals.

Adapt
To life changes and celebrate progress.

Our team

Charles Beatty, ChFC®, CLU®, FIC
Wealth Advisor
Charlotte office
CA Insurance Lic. #4296420

Charles' journey with Thrivent began in 1985. With almost 40 years of experience, he knows the importance of building relationships that last for generations. Charles has served as a mentor to the other Your Journey advisors and continues to lead our vision and mission as a team. He is passionate about tax mitigation and estate preservation strategies. His goal is for our clients to live and leave a legacy for the people and causes that matter to them.

Kelly Jones, CLTC®, BFA™, FIC
Financial Advisor
Hickory office

Kelly started her journey with Thrivent at the beginning of 2008, during what is now known as "The Great Recession." This set the tone for her mission to lead a practice deeply rooted in service and relationship with our clients. Kelly uses personalized planning to tailor a financial plan specific to your needs. She is passionate about client education, tax mitigation strategies, charitable planning and behavioral finance. Her goal is to lead people to a place of confidence and achieving dreams they never knew possible.

Robert Rich, FIC
Financial Advisor
Charlotte office
CA Insurance Lic. #4299749

Rob began his Thrivent journey in 1998. He focuses on both the pre-retirement and retirement markets, while also providing advice to our senior clients surrounding Medicare and Social Security concerns. Rob's goal for our clients is for them to be well educated in financial and estate matters, leaving them confident in their planning. He is also passionate about long-term care planning and building long lasting relationships.

Chris Leslie, MBA, FIC
Financial Advisor
Charlotte office

Chris started his journey with Thrivent in 2003. He is passionate about using his analytical background to design investment solutions tailored to each client's goals, while maintaining proper asset allocation. Chris is responsible for investment research, brokerage operations and reporting, including all investment-related communication with clients. He also manages third-party investment research, monitors client accounts and creates tactical trading strategies.

Mike Williams, FIC
Financial Advisor
Charlotte office
CA Insurance Lic. #4297680

Mike began his journey with Thrivent in 2004. He focuses on engineering holistic financial plans to provide clients with direction on how to meet their goals. He is passionate about protection as well as charitable and estate strategies. His goal is to ensure families are protected from life's unknowns and to provide them with confidence on their journey. Mike is also a coach and mentor to new financial advisors, helping them grow and reach their fullest potential.

Colby Bolick, FIC
Financial Consultant
Claremont office

Colby began his Thrivent journey as an intern while still in college at Appalachian State University and started as an advisor in 2009. Colby is passionate about small business planning. He has experienced firsthand the ups and downs of entrepreneurship and wants our clients to be properly prepared. Colby also concentrates on tax mitigation and estate strategies through holistic planning. He is passionate about mentoring new financial advisors with Thrivent.

Lucas Beatty, MBA
Financial Advisor
Gastonia office

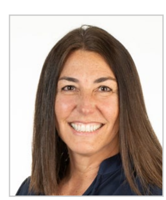
Lucas began his journey with Thrivent in 2017. He enjoys educating individuals and families on financial topics that are outside of their expertise. Lucas especially thrives in tax-efficiency planning and wealth management.

Matt Wogan
Financial Advisor
Charlotte office

Matt began his journey with Thrivent in 2020. His passion is helping clients with tax-efficient strategies to help fund their goals while confirming they have a plan for the unexpected. Matt wants clients to have meaningful, purposeful lives that enable them to live generously and leave legacies to the people and causes they care about.

Collin Carlton
Financial Advisor

Niki Smith
Director of
Operations



Tammy Seiler
Associate

Nancy Nolley
FIC
Associate

Jennifer Miller
Associate

Taylor Flanagan
Licensed Office
Professional

Jeannie Caldwell
Insurance Associate

Duke Boger
Insurance Support Associate

Cheyenne Davis
Office Professional

John Panosh
Office Professional

Alisa Dwyer
Insurance Associate

Kassandra Crapps
Insurance Office Professional

Claudia Sobieski
Office Professional

Service you can count on

For more than 120 years, Thrivent has helped people build their financial futures and live more generous lives. Today, we're a Fortune 500 company, offering a full range of expert financial solutions, serving more than 2.3 million clients as well as the communities in which they live and work.

$179 billion assets under management/ advisement*

Rated by:
AM Best, Moody's Investors Service and S&P Global Ratings[1]

Serving 2.4 million clients

ETHISPHERE® WORLD'S MOST ETHICAL COMPANIES® 2012 - 2024

Thrivent was named one of the "World's Most Ethical Companies" by the Ethisphere Institute for 13 years in a row.

*As of Dec. 31, 2023.

[1]Ratings are based on Thrivent's financial strength and claims-paying ability, but do not apply to investment product performance.

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Your Journey Financial Advisors is a financial services practice of Thrivent.

Not all team members can provide all products, programs and services in all states.

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

Thrivent provides advice and guidance through its Financial Planning Framework that generally includes a review and analysis of a client's financial situation. A client may choose to further their planning engagement with Thrivent through its Dedicated Planning Services (an investment advisory service) that results in written recommendations for a fee.

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. Thrivent.com/disclosures.

Insurance products, securities and investment advisory services are provided by appropriately appointed and licensed financial advisors and professionals. Only individuals who are financial advisors are credentialed to provide investment advisory services. Visit Thrivent.com or FINRA's BrokerCheck for more information about our financial advisors.