Marcia Alexander and Aaron Jones are Thrivent financial advisors. Both have worked with UMC churches and individuals. They offer **up to five sessions at no charge to clergy**. Marcia and Aaron provide personalized financial guidance to people at all stages of their journey through life (such as pre-retirement, new position, etc). Whether its life insurance, long term care, legacy planning or investment needs beyond Wespath, Marcia and Aaron are capable of applying the proper financial guidance and tools to move you forward with meaning and purpose. You can call Marcia and Aaron at 612-702-9631 or by email at marcia.alexander@thrivent.com or aaron.jones@thrivent.com.

Marcia and Aaron’s typical financial planning steps include:

1. We use the **first meeting** to officially gather some detail about your financial situation, a financial inventory if you will, so we have a good idea about your knowledge and history.
2. The **second meeting** is setting your goals (What do you want to do now, in 3-5 years, and in 10 years? What do you need to feel financially secure? If we are focusing on retirement, what goals do you have in retirement).
3. The **third meeting** is focused on specific product information that is helpful and resources as we explore your financial journey together. Some examples that we have gone through for other clients are:
   - Investments 101 (what does it mean to invest? What fees are charged?)
   - Looking to buy a house? What steps are needed?
   - Options to save that are not investing (Money market accounts vs. Savings or CDs)
   - Understanding your employee benefits: what they do for you and what is worth signing up for?
   - Retirement projections for young professionals or someone preparing for retirement.
4. In the **fourth step**, we put the plan formally together and make recommendations for changes to what you have right now or add services that would be helpful to your goals. This will include steps you need to do to put the recommendations in place.
5. The **fifth meeting**, as needed, to talk through other things.