

Thrivent Financial provides financial planning and investment services for the SouthCoast

By Jonathan Comey

Thrivent Financial is a unique organization that provides financial planning and investment services for Christians, and Jon Skov feels fortunate to be a part of it.

“I think sometimes people become intimidated by money, financial planners, and the stock market,” says Skov, who works from a North Dartmouth location along with office manager Beth Weinstein. “This really doesn’t need to be the case. Most people we work with just want to do the best they can with the money they have, provide for their families and enjoy their lifestyle both now and in retirement.

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Thrivent is a membership organization of Christians ...

We help members be wise with money ...

And live generously.

The result is stronger members, families and communities.

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“They want to be empowered and to have the capacity to help others along the way. They want to prepare for and navigate life’s transitions well. We want to partner with those who wish for a little coaching in coordinating those desires.”

Thrivent Financial is a Fortune 500 financial service organization that helps Christians by focusing on serving folks that are accumulating for, transitioning to, or living in retirement.

“As a financial service organization, we aspire to guide our members in making wise financial decisions with their money, and also want to help them live generously,” Skov says. “Our members recognize that life, and money, is more than about them. Most of our members are already involved in helping others through their church, community organization, or school, and we want to help them do more of what is already on their heart.”

Thrivent, as a not-for-profit organization, leverages its tax-

exempt status and invites its members to help distribute its tax savings for causes close to them.




“It’s really something different we do,” Skov says. “Connecting faith and finances, providing guidance for making wise decisions with money, and encouraging our members to live generously ... I’m very proud to be part of that.”

For Skov, the work isn’t work so much as a calling. In 2010, drawing on his experience working for other financial service organizations, he opened his own Thrivent practice. In 2014, the practice moved to a prime location located off Route 6 in North Dartmouth at 77 Wollcott Ave. – “We’re across the street from Home Depot, and next to TGI Fridays,” notes Skov.

Skov is a Chartered Financial Consultant and works as a Registered Investment Advisor, holding his FINRA Series 66, FINRA Series 7, and Life & Health licenses. Beth, the office manager, is also securities licensed which helps her serve

existing customers.

“To me, it’s really practical experience that makes the difference,” Skov says. “Life experience, financial experience, just being a student of behaviors and the industry – it all adds up. We have the experience, and by understanding our customers’ values we are able to guide them in aligning their plans with those values.”



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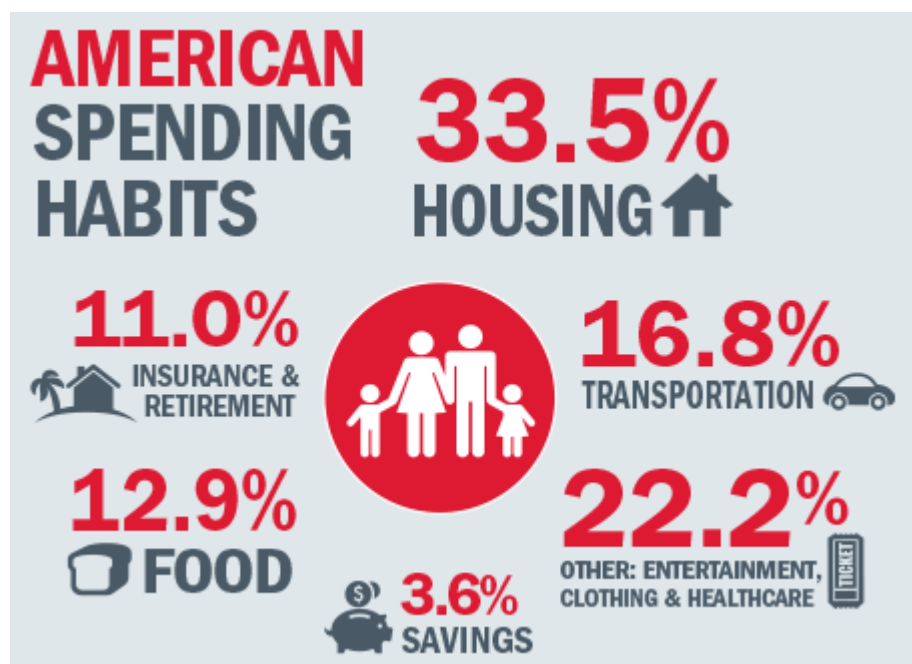
One investment track that Skov is particularly proud of is in the area of “values based” investing, and he says that interest and opportunities in that realm are expanding. “The key is to first discuss and understand what a person’s values are,” Skov says. “There is increasing interest to invest in companies deemed to be more responsible. We enjoy helping our members become more aligned in those areas.”

Their North Dartmouth branch often hosts educational events on topics like retirement income planning, navigating social

security decisions, and legacy giving through gifts and estate planning, and various other topics. They also are able to provide workshops through local hosts like churches or clubs who wish to provide a service for their members.

Keep in touch with all of these programs at Jon's Thrivent website.

For Skov, the work is rewarding, especially when he sees the impact it can have on people's lives.



"I was working with a couple where it became very clear to me that I was going to be the hand off guy to help execute the financial plans when the husband passed," Skov recalls. "This gentleman was extremely talented and organized, and he could have held his investments and insurance anywhere, but he chose Thrivent Financial because the Christian faith was important for him.

"When his time came, it came suddenly. No one likes to lose a loved one, but financially speaking his family was at peace. Today they're doing great. What an example of stewardship, and aligning a person's faith to their financial decision making. "I was proud to be a part of it."

Fortune Magazine, June 2017

The member's experience may not be the same as other members' and does not indicate future performance or success.

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Friday: 9:00am-4:30pm

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