Discover a different story.

PARABLE

WEALTH PARTNERS

parable

noun [ˈperəb(ə)l]

a simple and timeless story
usedtorevealadeepertruth

Some stories hide the truth.

When it comes to finances, you're told a lot of stories.

There's not enough.
You're already behind.
Your value is determined by how much you have.
Success is all about money.
Don't mess things up.

These messages can be exhausting, stressful, and scary. They also keep you and your relationship with finances in a box, bound by beliefs and emotions that limit you. As a result, the greater possibilities you are designed to be a part of stay hidden.

72% of Americans report feeling stressed about money.

Stress in America: Paying for our Health, August 2014, American Psychological Association

People can have fear, shame, or confusion about finances—and close themselves off to greater potential yet to be discovered.

Within each financial story is the potential for growth and abundance beyond what's initially visible.

At Parable Wealth Partners, we believe you can discover a different story.

Every person can experience bigger possibilities for life and finances.

Instead of fear, you can have hope.
Instead of embarrassment, you can find confidence.
Instead of stress, you can experience contentment.

Parable is committed to providing a holistic and collaborative approach to financial planning that helps you gain confidence in your finances—giving you the freedom to flourish in all areas of life.

71% of people who work with a Certified Financial Planner report feelings of confidence.

2018 CFP Certification Brand Promise Survey, June 2018, Heart and Mind Strategies

We want to help reveal true wealth—and we're not just talking about money.

See wealth in a new way.

We look at wealth a little differently here. The inherent worth of a person encompasses far more than the sum total of their finances. True wealth—the kind that leads to contentment and hope—goes beyond money. That's why part of Parable's core process is exploring what we call the Five Expressions of Wealth. By taking stock of your finances and also of the non-monetary resources you have—your attitude, time, relationships, and abilities—we believe you can discover a bigger picture of the value you have and can offer.

THE FIVE EXPRESSIONS OF WEALTH

At Parable, we believe that wealth is not defined by dollars alone but is fully expressed across five key areas of life:

Attitude

Time

Relationships

Abilities

Finances

finances

retirement

relationships

abilities

Discover the difference your ___life___ can make.

time

family

attitude

faith

As you see true wealth expressed across all areas of your life, you can discover ongoing growth and possibilities—for you and the world around you.

When we view our attitude, time, relationships, abilities, and finances as gifts to be grateful for—and to be shared—we experience greater contentment and joy.

The more you look for abundance, the more you will see it.

Activate the power of gratitude.

At Parable, we are passionate about helping you align who you are and what you've received in ways that catalyze contentment and energize generosity. Being grateful is a bridge to greater joy. There is power in seeing your whole life as a gift to be stewarded with gratitude and purpose.

Explore increased possibilities.

Through our customized financial planning, we help quantify abundance. For many clients, this has helped open doors to consider new options related to philanthropy, life experiences, and family legacy planning. We love seeing our clients discover new opportunities that enrich their lives and relationships.

In a recent study, highly generous people were happier, enjoyed deeper relationships with their loved ones, had more close friends, and felt more satisfied with their personal possessions.

The Ascent, *It Pays to Be Generous*, November 2019

Discovering a different story deserves a relational approach.

Each person is different—with unique needs, goals, and experiences. That's why Parable offers a highly relational approach to our services and process. We take the time to get to know you and your values, and we work to offer customized planning that will inspire confidence to help you keep moving forward.

OUR SERVICES

Our services are designed to take a holistic and collaborative approach to wealth management. We offer three aspects of partnership based on your needs and goals.

Financial Advice

Designed to align to your values, goals, and mission, our comprehensive planning process includes a personalized plan, relationship-centric services, and collaborative advice from our team of advisors and experts.

Investment Management

Through managed account programs with ongoing investment advice and attentive service, we help align your portfolio with your values, define an appropriate asset mix for your goals, and manage tax implications.

Curated Product Solutions

From protection planning to investments, we take the time to get to know your situation and then recommend the financial tools that will best fit your specific needs.

OUR PROCESS

Together, we'll design a well-organized road map so you can make decisions with confidence. Our process will guide you through ten key areas of financial planning:

- Tax Strategies
- Retirement Planning
- Education Planning
- Protection Planning
- Cash Flow Planning
- Investment Planning
- Philanthropic Planning
- Estate Planning
- Legacy Strategies
- Business Planning

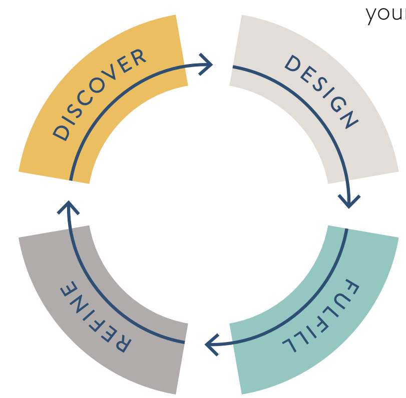
Our collaborative process includes four key phases:

1 Discover

We meet with you to establish a partnership, identify your unique values, and clarify goals.

2 Design

After collecting data, we begin to design strategies aligned to your values and goals.



4 Refine

As your life and priorities evolve, we continue collaborating with you to incorporate all expressions of wealth into planning.

3 Fulfill

We work side-by-side with you to choose and implement strategies that will help you achieve your goals.

At Parable, our passion is to walk this journey with you—each step of the way.

Every relationship is a journey, and we serve our clients and their families for the long-term. Inspiring your confidence through a financial plan is only part of discovering a different story for wealth. Through an ongoing relationship, we seek to help ignite your passions and awaken your gifts for good in ways that enliven your life and the world around you.

OUR PURSUIT

1 Inspire Confidence

Imagine worry and fear fading as you make decisions based on a well-designed financial plan—leading to new levels of hope and contentment.

2 Ignite Passions

Imagine your true wealth aligning with what you care most about—unleashing the joy that comes from living out your purpose.

3 Awaken Gifts for Good

Imagine a life of joy where your unique giftings advance good beyond your own life—impacting those around you for generations to come.

Together, we can be part of revealing an even bigger story.

Each of our individual stories adds up to something much bigger. We have an opportunity to be part of creating a better future for our families and our communities—revealing a story that can keep building and extending beyond our own lives.

Let's discover this story together.

OUR NAME

We chose the name Parable because it speaks to our belief that within each person's story, there is a deeper message of hope and contentment to be discovered.

A PROUD PARTNERSHIP

Parable Wealth Partners is proud to be an independent practice of Thrivent Advisor Network, a subsidiary of Thrivent Financial, a not-for-profit membership organization of Christians that has helped members be wise with money for more than 100 years. Thrivent is a Fortune 500 organization.

Parable—formerly known as Colonnade Group—was founded in 2002 when our founding partners joined together after nearly a decade of separately growing their financial planning practices. Even then they saw a need for a different approach to financial planning—one that reveals hope and abundance where there once was worry and fear. Today our team continues in that work as we serve a diverse community of clients, both Christian and not, who are looking to discover a different story of wealth.

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