

# Purpose Driven— A Business Imperative

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# The original purpose based company

Driven by a higher purpose, we strive to help people make the most of all they've been given.



More than  
120 years of  
service to our  
clients



**Fortune 500**  
Named in  
*Fortune* magazine  
May 2023



\$283 million  
raised and donated  
by Thrivent, clients  
and others\*



More than  
1.9 million volunteers  
participated in 145,543  
Thrivent Action Teams\*



Since 2005, Thrivent  
and Habitat partnership  
has invested over  
\$280 million in safe  
and affordable housing

**ETHISPHERE®**  
**WORLD'S MOST**  
**ETHICAL**  
**COMPANIES®**  
**2012 - 2023**



# 73%

**Of consumers believe that companies should have a legal responsibility to people and planet, alongside maximizing profits.**

Source: Source: The EY Future Consumer Index, June 2021

“The CEO Imperative: Make sustainability accessible to the consumer”

*The EY (Ernst & Young) Future Consumer Index tracks changing consumer sentiment and behaviors across time horizons and global markets, identifying the new consumer segments that are emerging.*

# 90%

**Of employees who work at companies with a strong sense of **purpose** say they are more inspired, motivated and loyal.**

Source: Porter Novelli Purpose Tracker August 2020.



Purpose driven  
businesses  
outperform on  
many fronts.



Engagement  
Loyalty Happiness  
Health  
Community engagement  
Innovation  
Top Talent  
financial performance  
Impact  
Inspired team





CHUBB®



Honest®

BOSTON BEER co.

•MAKERS OF•

SAMUEL  
ADAMS



TWISTED TEA  
HARD Iced Tea

TRULY  
HARD SELTZER

ANGRY  
ORCHARD  
HARD CIDER



L.L.Bean



WHOLE  
FOODS  
MARKET

Southwest®

patagonia®

TRADER  
JOE'S®

Stonyfield  
ORGANIC



COSTCO  
WHOLESALE



method.



BEN & JERRY'S

NORDSTROM

Unilever

Dove  
Let's Change Beauty

FedEx

Colgate®

The Container Store®

The Motley Fool®

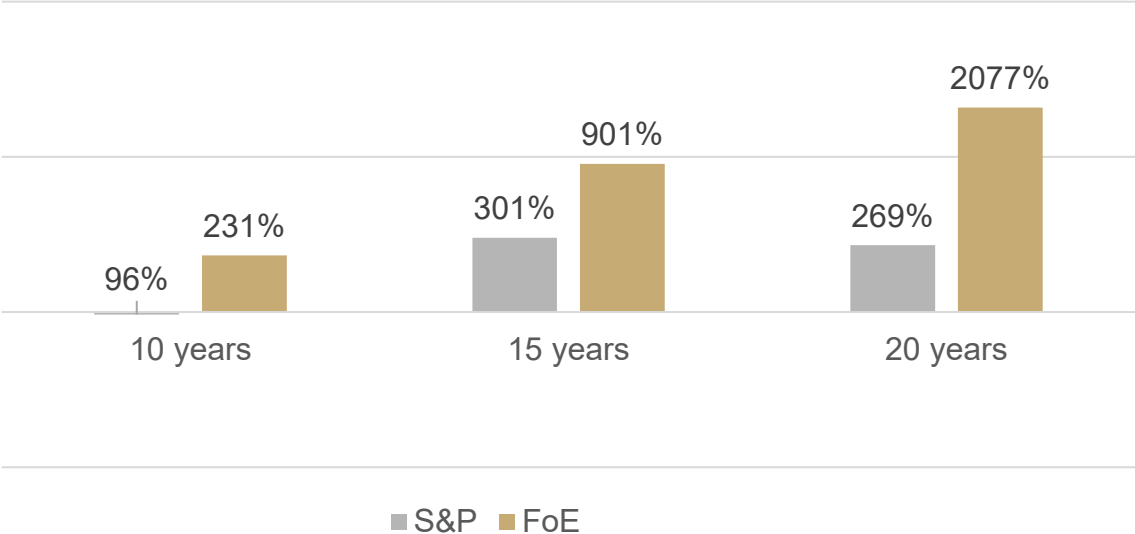
T.Rowe Price

# 7x

**Conscious companies\*  
have outperformed the  
S&P 500 by 7x over a  
20-year period**

\* Conscious companies are referred to as “Firms of Endearment”  
Source: *Conscious Capitalism Field Guide*, 2018

## Firms of Endearment outperform the S&P



Data calculated as of June 30, 2017  
Source: *Conscious Capitalism Field Guide*, 2018

Note: The Standard & Poor's 500 (S&P 500) is a market-cap weighted index comprised of the common stocks of 500 leading companies in leading industries of the U.S. economy. You cannot invest directly in an index.

# When PURPOSE is the key driver, not profits



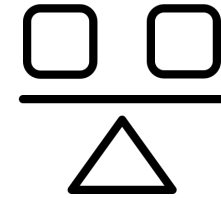
## Long-Term Vision

Focus shifts from quarterly earnings to long-term vision of doing good.



## Intentional Culture

Culture is intentionally crafted and cultivated, team members feel motivated to share talents



## Balance

All stakeholders are equally considered.





The Advisor Business Model  
is perfectly suited for being a purposeful business

Believes that financial advisors  
are in a unique position to  
change lives, give people hope  
and have a positive impact in  
our communities.

# The RIA business model lends itself to being purpose driven...

Autonomy

Responsibility

Expertise



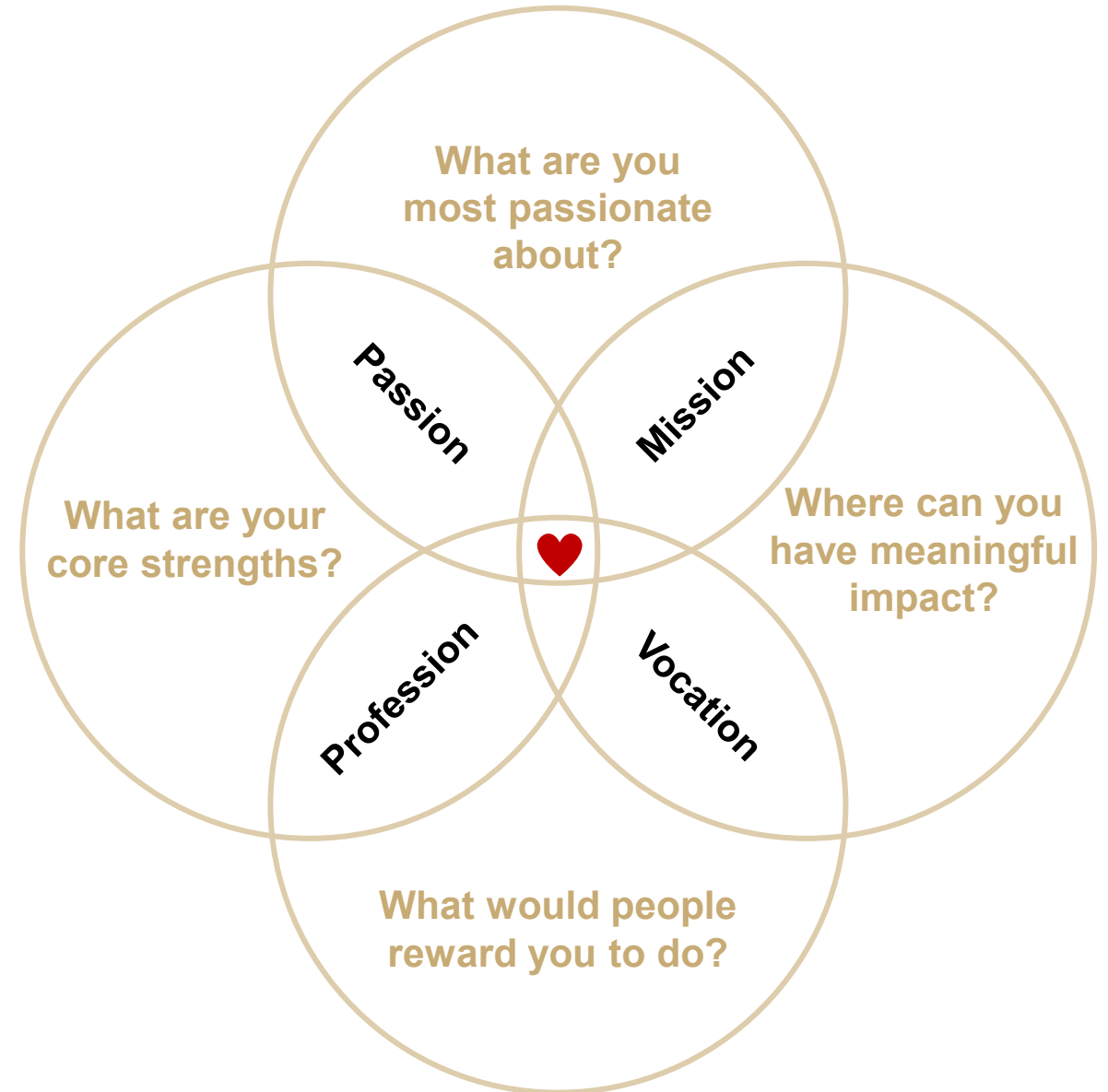
# Developing your Purpose Statement

## OUR PURPOSE

To provide a community for like-hearted financial advisors who believe in leading and living generously.



Where your  
purpose  
resides...





# Advisors' Purpose Journey

To help people  
make wise  
decisions around  
the most important  
aspects of their  
financial life.

To build and lead  
a diverse and  
inclusive team who  
come to work  
engaged, ready to  
serve clients and  
grow the business.

To leave a legacy  
that will have a  
positive impact  
on our  
community for years  
to come.

# Based on the Advisor's Purpose Journey, where are you on your purpose journey?

## A. Early stage

ex: Help people make wise financial decisions

## B. Mid stage

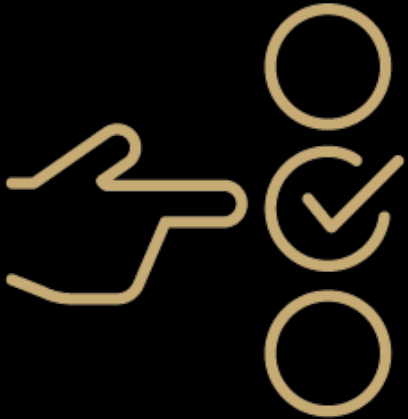
ex: Lead a business and building a team

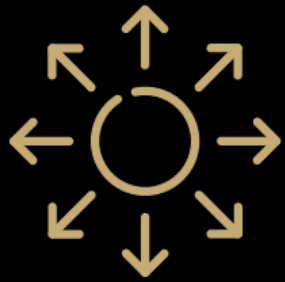
## C. Later

ex: Leave a legacy that will make a lasting impact

## D. Haven't started my journey

## E. None of these apply





# Amplify Your Impact

# Amplifying your impact by applying your purpose with all your stakeholders



# Amplify your impact with *your team*



Inspire

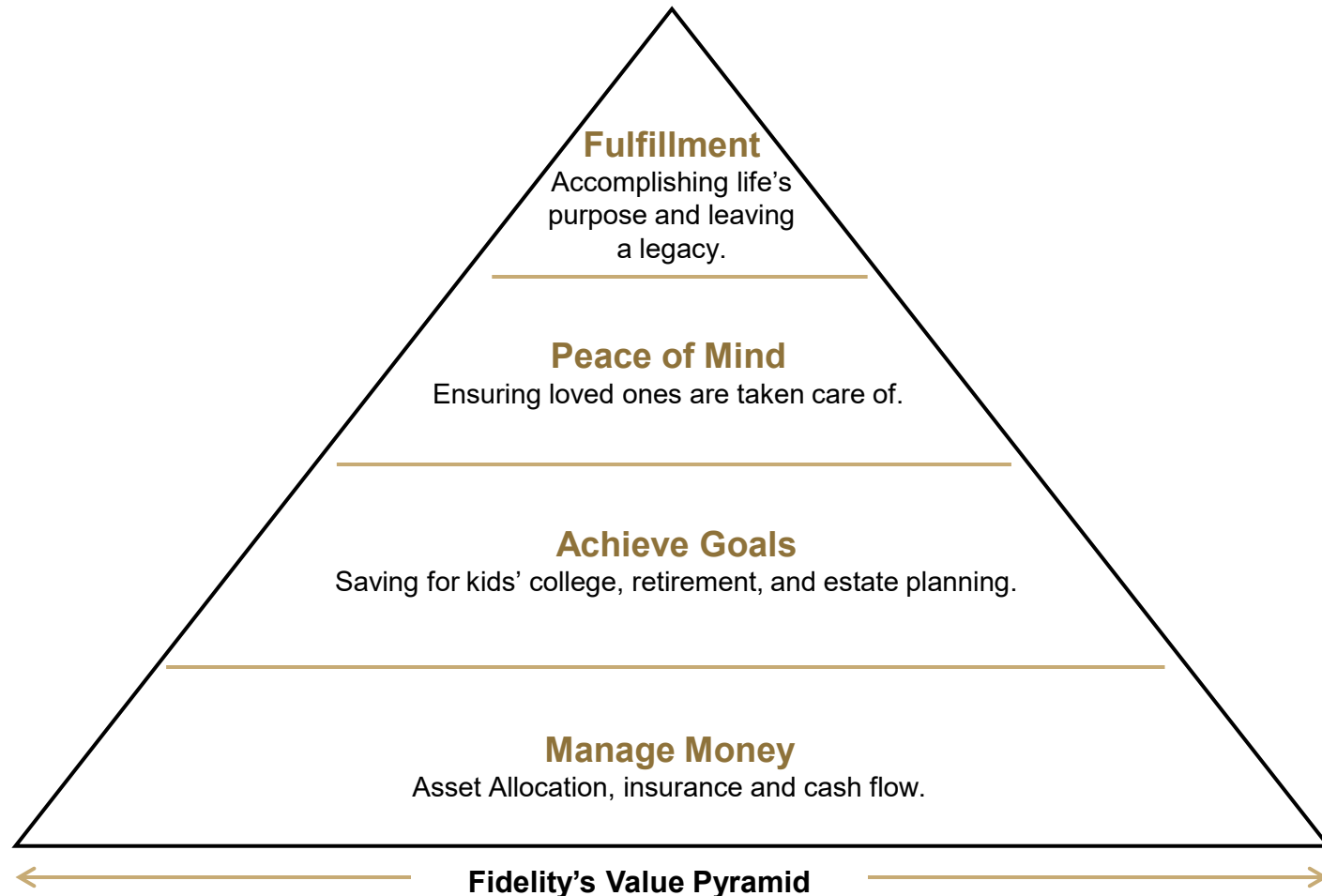


Develop



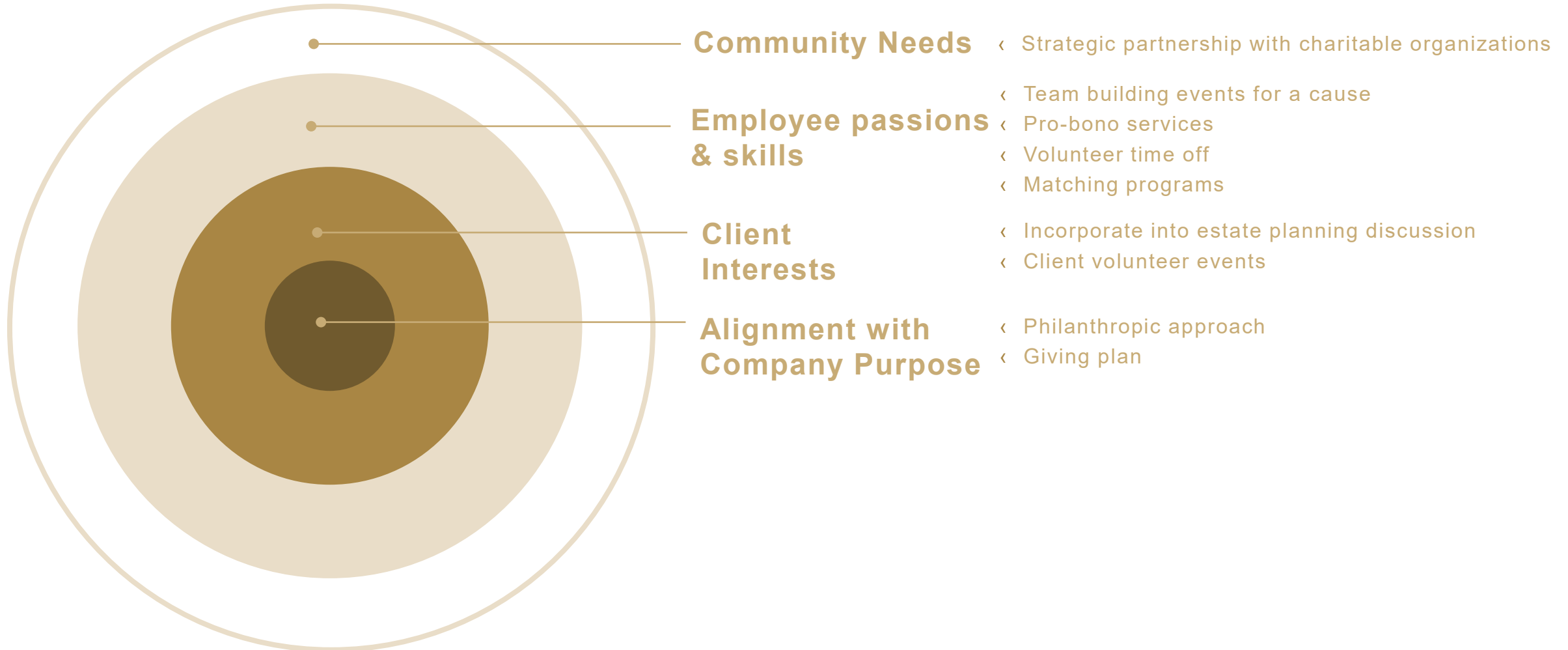
Empower

# Amplify your impact with **your clients**





# Amplify your impact in **your community**



# Purpose in Action— Advisor Panel Discussion

# Purpose in Action—Advisor Panel



**Seth Streeter**  
Co-Founder & Chief Impact Officer  
Mission Wealth



**Bruce Ensrud**  
Wealth Advisor  
Parable Wealth Partners



**Jamie French**  
Wealth Advisor  
Advent Partners

# Resources to Amplify Your Impact

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**Jennifer Lehman**  
Program Director  
Chartered Advisor in Philanthropy  
The American College of Financial Services



**Katie Hammer**  
Vice President  
Development and Communications  
Foundation for Financial Planning



# Empowering independent financial advisors to amplify their impact♥

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