

Newsletter

August 2026

Let's connect



Left to right: Richard Minton, Service Advisor / Diana Ashbaugh, Associate Financial Advisor / Jesse Davison, Director of Dedicated Planning and Investment Operations / Stephanie Shields, Wealth Advisor / Luke Cattau, Associate Wealth Advisor / Chelsea Zinser, Practice Support Associate / James Pendleton, Insurance Support Associate

We love helping our clients do well—so they can go on to do good in the lives of others. We believe we're called to make a difference, and it's a privilege to walk alongside you in that journey.

At Shields Cattau Financial Group, everything we do starts with getting to know you—what matters most, what you care about and where you want to go. From there, we build a plan that reflects your values and helps you move forward with confidence.

Our favorite part is celebrating alongside you as goals turn into milestones that once felt out of reach. It's an honor to be part of your story.

thrivent.com/shieldscattau

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959 South Coast Dr., Ste. 374
Costa Mesa, CA 92626

Team member spotlight

Meet Diana Ashbaugh, Associate Financial Advisor

What experience or background do you bring that people may not know? Before joining Thrivent, I worked at Stanford Children's Health, helping families whose children had received serious diagnoses connect with financial resources and support. That experience taught me not to sweat the small stuff and reinforced the importance of being prepared for the unexpected. I have seen firsthand how having a plan in place can provide stability during life's most challenging moments.

Do you have any hidden talents or hobbies? I play five musical instruments. My family likes to remind me that I have collected instruments faster than I've mastered them all.

What attracted you to join our team/company? Thrivent's commitment to comprehensive financial planning was a natural fit for me. I was also drawn to a team culture that values collaboration, supports one another and encourages everyone to grow personally and professionally.

If you could instantly master any skill, what would it be? Speaking multiple languages. Building relationships is one of my favorite parts of what I do, and being able to connect with people in their native language would be amazing.

What's your go-to lunch order? Pasta. It's reliable, comforting and has never let me down.

What's your favorite TV show or podcast right now? "Quantum Leap." I enjoy the adventure, problem solving and the reminder that small actions can have a big impact.

What is your favorite part of being on the Shields Cattau team? The people. This team is incredibly talented, hardworking and genuinely invested in each other's success. We celebrate wins together, support each other through challenges, and create an environment where everyone is encouraged to bring their best every day.

Meet Chelsea Zinser, Practice Support Associate

What experience or background do you bring that people may not know? I grew up in the Florida Keys and that really shaped who I am. It gave me a laid-back mindset along with a strong appreciation for the small-town sense of community, where everyone looks out for each other and feels like family.



Diana, her husband, Brian, and their son and daughter.

Meet the team



Stephanie Shields, AEP®, CFP®, FIC, RICP®, CLTC®, BFA™
Wealth Advisor



Luke Cattau, CFP®, FIC, CLTC®
Associate Wealth Advisor



Diana Ashbaugh, BFA™
Associate



Jesse Davison, FIC, RICP®, CLTC®
Director of Dedicated Planning and Investment Operations



Chelsea Zinser, BFA™
Practice Support Associate



Richard Minton, ChFC®, CLTC®, BFA™
Service Advisor



James Pendleton
Insurance Support Associate

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I feel like this is reflected in how I work with both teammates and clients.

Do you have any hidden talents or hobbies? I'm a big DIY-er! I love figuring things out and taking on projects myself, whether it's something creative or problem-solving.

What attracted you to join our team/company?

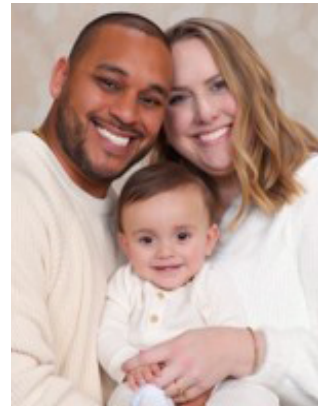
I was really drawn to the charitable aspect of the team and the focus on giving back. It is meaningful to be part of a group that values going out into the community and making an impact together.

If you could instantly master any skill, what would it be? I'd love to instantly master a new language. It's such a valuable way to connect with more people and broaden perspectives.

What's your go-to lunch order? Usually, I'll go for a salad or a wrap. I tend to pick something quick and simple during workdays.

What's your favorite TV show or podcast right now? I've been watching "Suits." I'm a little late to the show, but I'm catching up quickly!

What is your favorite part of being on the Shields Cattau team? The collaboration and support across the team. Everyone is incredibly helpful, and it really feels like we're all working together to deliver the best client experience.



Chelsea, her husband, Genesis, and their son Liam.

Make the most of your thrivent.com login

Did you know your thrivent.com login gives you access to more than just your account balances? It's a powerful tool designed to help you stay organized, track your progress and take advantage of the full range of benefits available to you. Here are a few ways you can make the most of your account:



View your accounts in one place. Easily monitor balances, transactions and overall progress toward your goals anytime.

Track applications and transfers. Stay up-to-date on items currently in process and see where things stand without needing to call or email.

Access important documents. Find statements, tax forms and other key documents whenever you need them.

Explore Thrivent Member Benefits. Search for opportunities like Thrivent Action Teams, member programs and giving initiatives available to you.

Stay connected with your planning team

Quickly reference details from your plan and keep everything organized in one secure place.

If you haven't logged in recently, we encourage you to take a few minutes to explore your account. If you need help getting set up or navigating your dashboard, our team is always happy to assist—just give us a call!

Love Costa Mesa event

As a team, we participated in Love Costa Mesa this past May by partnering with our clients and staff to serve our local neighborhoods through hands-on community projects. During this annual citywide day of service, we joined others across Costa Mesa to care for our community and create meaningful, lasting impact.

Our team supported neighborhood gardening initiatives, planting California native plants throughout residential streets. These efforts help beautify the community, support sustainable landscaping and create a stronger sense of connection as we work alongside one another to care for the neighborhoods we serve.

Love Costa Mesa is one of three “Love” events we participate in each year. We’re looking forward to continuing this effort with Love Orange in October and Love Irvine in November. If you’d like to volunteer and join us for an upcoming event, we’d love to have you—please give our office a call and we’ll make sure to send you the sign-up details.



Stephanie and Linda.



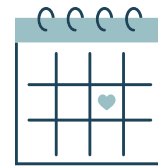
Diana planting California native plants.



Team members and volunteers.



Luke and Rick building a garden bed.



Upcoming events

Economic Update Dinner

September 10

Noon to 2 p.m. PT

Karl Strauss Brewing Company
901 S. Coast Dr.
Costa Mesa, CA 92626

Join us for a special educational dinner focused on the markets, economy and key financial planning insights.

Love Orange (volunteer event)

October 3

9 a.m. to noon PT

St. Paul's Lutheran School
Event Center
901 E Heim Ave, Orange, CA 92865

Serve alongside our team and community as we create no-sew fleece blankets for Marines at Camp Pendleton and support local outreach efforts.

Love Irvine (volunteer event)

November 7

9 a.m. to noon PT

Crean Lutheran High School
12500 Sand Canyon Ave.
Irvine, CA 92618

Join us for another opportunity to give back by helping create fleece blankets for Marines at Camp Pendleton while connecting with others in the community.

Interested in learning more or participating? We'd love to hear from you. Please contact our office for additional information.

No products will be sold at these events.

Stephanie – Mission Trip to Honduras



Kimberly Greene with the water system built in the community they were serving.



Stephanie and her niece, Kimberly, helping in the lice clinic. They washed, deloused and styled hair.

Stephanie recently returned from a service trip to Honduras in early June, where she partnered with World Gospel Outreach to support underserved communities through hands-on service. During the trip, the team worked to help build and improve access to clean water systems—an essential resource that will have a lasting impact on the health and well-being of the families in the community.

In addition to the gift of clean water, the team also spent time caring for local children by helping with lice treatment—washing and delousing their hair and even styling it afterward. This small but meaningful act not only supported the children's health and hygiene but also created moments of joy, dignity and connection.

Service and giving back are at the core of who Stephanie is, both personally and professionally. She is deeply involved in mission work and has participated in multiple service trips to Honduras, as well as Habitat for Humanity builds, reflecting her ongoing commitment to making a meaningful difference in the lives of others.

Get involved: Lead a Thrivent Action Team

Looking to make a difference in your community? Thrivent Action Teams make it simple to turn your idea into impact.

How it works:

- Choose a project you care about (service, fundraiser or educational event)
- Gather a small team of volunteers
- Apply online through your Thrivent account
- Log in at thrivent.com, then search "Thrivent Action Teams" or go to the Giving/Community section to start your application
- Once approved, you'll receive resources—including up to \$250—to help bring your project to life

It's an easy way to support a cause that matters to you while making a real impact in your community.

Stay connected

Website: thrivent.com/shieldscattau

Facebook: facebook.com/shieldscattaufinancialgroup

Email: shieldscattaufinancialgroup@thrivent.com

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