



Dee Kerr, CFP®

Financial Advisor

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Focused on what matters to you

Getting your finances in order isn't always easy or clear. That's why I'm here to provide the expertise and support you need. Whether you're just starting out or preparing for a meaningful retirement, you deserve personalized financial guidance driven by what's important to you.

Together, we'll assess your financial picture and explore how you can:

- Help strengthen your financial position.
- Protect your financial future.
- Prepare for an unexpected illness, injury or loss.
- Care for your family after you're gone.
- Invest with purpose and manage your assets.

Professional Highlights

- CFP® (CERTIFIED FINANCIAL PLANNER®), a certification granted by CFP Board, Washington, D.C.

Education and Experience

- FINRA Series 63 Uniform Securities Agent State Law Exam.
- FINRA Series 7 General Securities Representative.
- FINRA Series 65 Uniform Investment Advisor.
- Life & Health Insurance License in AZ, TX, CA.
- Bachelor's degree in Speech, University of Texas

Specializations

I specialize in the following:

- Investments
- Retirement planning
- Solutions for businesses
- Retirement income planning
- Life insurance

Personal Profile

- Married to Mickey Kerr
- Full-time Oro Valley Resident
- Active member of Rotary
- Member Resurrection Lutheran Church

Giving Back

I support the following charities and causes:

- Luke5 Adventures

Who we are

At Thrivent, we believe money is a tool, not a goal. Driven by a higher purpose at our core, we are committed to providing financial advice, investments, insurance, banking and generosity programs to help you make the most of all you've been given.

At our heart, we are a membership-owned fraternal organization, as well as a holistic financial services organization, dedicated to serving your unique needs. We focus on your goals and priorities, guiding you towards financial choices that will help you live the life you want today—and tomorrow.



Service you can count on

For over 100 years, Thrivent has been helping people build their financial futures and live more generous lives. Today, we're a Fortune 500 company, offering a full range of expert financial solutions, serving over 2 million clients, as well as the communities in which they live and work.



**\$179 billion
assets under
management/
advisement***



Rated by:
AM Best, Moody's Investors Service
and S&P Global Ratings¹



**Serving 2.4
million clients***

**ETHISPHERE®
WORLD'S MOST
ETHICAL
COMPANIES®
2012 - 2024**

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*As of Dec. 31, 2023.

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Thrivent provides advice and guidance through its Financial Planning Framework that generally includes a review and analysis of a client's financial situation. A client may choose to further their planning engagement with Thrivent through its Dedicated Planning Services (an investment advisory service) that results in written recommendations for a fee.

