NEWS
For immediate release

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Gertsema Wealth Advisors Announces Educational Events Focused on Purposeful Giving and Longevity

Saint Joseph financial planning and investment management firm invites community to explore charitable giving and practical strategies for living healthier, more energized lives

SAINT JOSEPH, MO (May 7, 2026) – Gertsema Wealth Advisors (GWA), an independent SEC Registered Investment Advisor (RIA) and financial planning firm, today announced two upcoming educational events designed to help individuals and families align their money and lifestyle decisions with what matters most to them. The firm will host a Lunch & Learn in June on purposeful charitable giving in retirement, along with a May women's event focused on practical, sustainable longevity strategies. Both events will be held at GWA's offices located at 2425 N. Woodbine Road, Suite B&E, in Saint Joseph, Missouri.

SUPPORTING CLIENTS AND COMMUNITY THROUGH EDUCATION

Bringing in local nonprofit voices and wellbeing experts reflects the firm's belief that financial planning should support every aspect of a person's life, from their philanthropic goals to their day-to-day well-being.

"Purposeful planning is about much more than numbers on a page. It's about helping people use their resources to live the life they want and support the causes they care about," said CEO and Wealth Advisor Nick Gertsema, CFP®, ChFC®, RICP®, AIF®. "These events are an extension of our commitment to educating our clients and the broader community, whether that means making tax-smart charitable gifts in retirement or making everyday choices that support long-term health and vitality."

WOMEN'S EVENT: ADDING YEARS TO YOUR LIFE

On Thursday, May 14, at 5:30 p.m., GWA will host its 2nd quarter women's event featuring Journey for Longevity founders Jessica Bledsoe and Heather Hausman. This engaging evening program is designed for women who want to feel more energized, resilient, and vibrant in their everyday lives by making realistic, sustainable changes.

Bledsoe and Hausman will share how their approach to longevity focuses not just on adding years to life, but on adding life to your years through better sleep, nutrition, and movement. Attendees will learn simple, actionable strategies they can begin using right away to support their overall well-being, with plenty of time for discussion and questions in a relaxed, supportive setting.

The event is free to attend, with RSVP required by Tuesday, May 12, 2026. Hors d'oeuvres and beverages will be served.

Learn more and register here or call GWA at 816-259-5060 or email taylor@gertsema.net.

THE POWER OF PURPOSEFUL GIVING IN RETIREMENT

On Thursday, June 11, at 12:00 p.m., Chief Operating Officer and Wealth Advisor Scott Keegan will lead a Lunch & Learn Session: "The Power of Purposeful Giving in Retirement" at the GWA office.

During this interactive session, Scott will walk attendees through how Qualified Charitable Distributions (QCDs) can be used to help satisfy Required Minimum Distributions (RMDs) from IRAs while potentially reducing tax exposure and increasing the impact of their charitable gifts.

In addition to learning about tax-efficient giving strategies, attendees will hear from representatives of local nonprofit organizations who will share their missions, the meaningful work they are doing to support individuals and families in the Saint Joseph community, and ways to get involved and support their organizations. Whether participants are already taking RMDs or are planning ahead for future retirement income decisions, they will walk away with practical ideas for aligning their resources with the causes they care about most.

"We are honored to partner with community organizations and leaders who share our desire to help people feel more confident and empowered about their future," said Gertsema.

The Lunch & Learn is free to attend, but RSVPs are required by Monday, June 8. To reserve a seat, call GWA at 816-259-5060 or email taylor@gertsema.net.

ABOUT GERTSEMA WEALTH ADVISORS (GWA)

Gertsema Wealth Advisors is an independent wealth management firm focused on helping individuals, families, and business owners plan with clarity and confidence. Founded in 2018 by Mike Gertsema to provide fee-based planning that puts the client first and focuses on holistic planning before investing. Today, GWA has a multigenerational team led by CEO and Wealth Advisor Nicholas (Nick) Gertsema, supported by several additional wealth advisors and a dedicated operations and client service staff, allowing the firm to offer personalized strategies for retirement, tax and estate planning, risk management, and more. The team emphasizes education, transparency, and making the complex simple so clients can clearly understand and feel confident about what is happening with their money. To learn more about the firm's guiding principles and service offerings, visit www.gertsema.net.

Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor.

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